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INDUSTRIAL OFFICIAL PLAN

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AMENDMENT No. 334 to the OFFICIAL PLAN of the CITY OF HAMILTON PLANNING AREA

PREPARED FOR
THE CITY OF HAMILTON
BY THE
PLANNING AND DEVELOPMENT DEPARTMENT
of the regional municipality of hamilton - wentworth

URB/MUN.

November 1977





OFFICIAL PLAN FOR INDUSTRY


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SECTION 1

BASIS OF THE AMENDMENT

A GENERAL STATEMENT ON THE PURPOSE, LOCATION,
BACKGROUND, RATIONALE OF THE AMENDMENT.

SECTION 1

BASIS OF THE AMENDMENT

The growth of industry and that of the City which for many years was considered the matriarch of heavy manufacturing, has been in tandem. Its significance in the municipal economy has led some to describe Hamilton as the Pittsburg or Birmingham of Canada.

Recent years have witnessed a significant change in both the rate and direction of the City's growth. Greater productivity in manufacturing has advanced the shift to a service oriented economy. There has been a marked variation in the nature of industrial expansion and development. In addition, an increasing portion of Hamilton's labour force has elected to reside outside of the City limits.

It is indeed timely that the City re-assess the role of the activity largely responsible for its present dimension. It must now determine to what extent:

- past incentives to the location of manufacturing are still considered to be of consequence;
- these locational advantages have been exhausted; and
- industry remains as a growth generating factor to this community.

Should continued growth by industry be deemed both an attainable and desirable goal, it follows that the municipality in its industrial policies, must reflect an awareness of those factors likely to enhance such industrial development.

To prepare an objective frame of reference from which to evolve an official plan that will promote the industrial well being of Hamilton it is necessary:

- 1) to identify and describe the existing structure and growth characteristics (changes and trends) of both manufacturing employment and employment generating activities.
- 2) to determine and describe the significant existing and probable future relationships between employment and employment generating activities vs. the remainder of the community at large - including an evaluation of the strengths and weaknesses of these relationships and the implications for the future urban structure of the City of Hamilton.
- 3) to assess the relative supply and demand of lands available for those industries with the potential to locate or expand in the Hamilton area.

- 4) to identify and describe the existing policy of the provincial, regional and municipal government which is intended, directly or indirectly, to influence the growth, distribution and character of employment and employment generating activities in Hamilton, and to evaluate the present effectiveness and consistency of such policy.

The purpose of this Official Plan then is to evaluate the changes Hamilton has undergone since the City's Official Plan was approved by the Minister in June, 1951, and ultimately to formulate policies designed to guide future industrial land use.

The location for which this Official Plan has legal implications constitutes those lands and water areas within the City of Hamilton boundaries.

SECTION 11 - POLICIES

THE GOALS AND OBJECTIVES STATEMENTS, THE
SCHEDULES, THE DEFINITIONS, AND STANDARDS
COMPRISE THE POLICIES OF THIS AMENDMENT.

DEFINITIONS

The industrial definitions of this Amendment supersede those of the 1951 Official Plan together with any definitions related to industry in previous amendments.

Areas of Industry

The industrial classification of lands shall mean that the predominant land use in an area so designated shall be for industry which is defined as manufacturing, processing, warehousing, construction, repair and servicing together with those land uses ancillary to industry such as:

- (i) retail outlets accessory to industrial uses on the same property lot.
- (ii) business enterprises intended to directly serve the established industries and their personnel.
- (iii) research facilities to investigate products and processes essential to the industrial uses in the same area.
- (iv) residence for caretaker or watchman.
- (v) public transportation terminals.
- (vi) highway and road related services, e.g. auto-service stations.
- (vii) open space reserved for the purposes of buffering, industrial expansion, employee recreation, etc.
- (viii) off-street employee parking and commercial parking lots where required for industrial uses.
- (ix) industrial waste disposal facilities.
- (x) and all uses which complement and do not interfere with or detract from the primary industrial function of the area.

General Industrial Areas

General Industrial Areas shall be regarded as areas containing a wide range of industries except those which may have a detrimental environmental effect on other industrial uses.

Restricted Industrial Areas

Restricted Industrial Areas shall be regarded as areas containing a limited range of industries so that such areas shall be environmentally compatible with adjacent residential, commercial, or public use areas.

Segregated Areas of Industry

Segregated Areas of Industry shall be regarded as areas which are not located in close proximity to residential or commercial areas and which contain a wide range of industries and, subject to Section 1.1.2 provide a location for concentrations of those industries which may have a detrimental environmental effect on other industrial uses.

Mixed Residential-Industrial Uses

- (a) Mixed Residential-Industrial Areas shall be regarded as areas containing a mix of a wide range of residential uses, street-related retail uses, and those industrial uses which are environmentally compatible with adjacent and neighbouring uses.
- (b) Council shall employ its powers of regulation and review and shall make requirements to ensure the mutual compatibility of uses in Mixed Residential-Industrial Areas.

Central Area Industry

Central Area Industry shall be regarded as areas that provide an appropriate location for industries which derive benefit from proximity to the markets, supplies and services of the Central Core.

INTERPRETATION

The provisions of the Official Plan as amended from time to time respecting the interpretation of that plan shall apply with respect to this amendment.

It is intended that this amendment express the principles and policy which will govern Industrial land use within the Planning Areas covered hereby, and while it is the most comprehensive statement of policy possible at this time, it is not to be assumed that changes will not be made to any of these principles and policy during the passage of time and after consideration by the authorities concerned. To this end, it is considered that the Plan should be comprehensively reviewed in the light of development which has taken place hereunder and any changes in the pattern of demand or in the economy or otherwise.

The boundaries between the classes of land use designated in Schedules 'A' and 'B' are intended to be general and not to define the exact limits of each such class. Furthermore, as outlined in the Policy Section of this Amendment, the merit of individual industrial properties will be determined by detailed secondary plans and designated accordingly. Until such time as they are reviewed, however, they will remain in the Restricted Industrial designation as depicted on Schedule 'B1'.

It is intended, therefore, that adjustments may be made in respect of these boundaries in zoning by-laws without the necessity of further amending the Official Plan so long as such by-laws conform to the general intent and purpose of this amendment.

POLICIES

1. Goal

To provide a comprehensive development strategy that best ensures Hamilton will retain its position as a centre for industry.

1.1 Objective

Define and designate the land use pattern that is most conducive to the efficient performance of industry.

1.1.1 Implementation Policy

It is the intention of Council that the boundaries of areas designated for industry and the quantities of land to be made available for the various permitted uses within each such area will be established for each area designated for industry by the provisions of detailed secondary plans. It is, however, the policy of Council, in the absence of any more detailed policy, to pass by-laws affecting areas designated for industry which are in accordance with the provisions of this section and with good planning practice.

1.1.2 In passing by-laws to permit industrial buildings or uses in areas designated for industry, Council shall have regard for:

- (i) the provision of adequate car and truck access and parking and loading facilities; and
- (ii) the impact of such industrial buildings or uses on the surrounding area in terms of traffic flows, building forms, and relationships to neighbouring buildings or uses.

1.2 Objective

To ensure sufficient land exists, both in suitable quantities and locations for the continued operation and expansion of industry.

Implementation Policy

- 1.2.1. In order to recognize the existing pattern of land use in Mixed Residential-Industrial Areas, Council shall employ the Zoning By-law in such a manner as to generally recognize existing uses, and upon application therefore, may enact amendments to the Zoning By-law, subject to Sections 1.2.2 and 1.2.3 of this plan.
- 1.2.2. In Mixed Residential-Industrial Areas, Council may, subject to Section 1.1.2 pass by-laws to permit:
- (i) industrial buildings or uses which are environmentally compatible with adjacent and neighbouring uses; or
 - (ii) incidental industrial buildings or uses; or
 - (iii) buildings containing only residential uses, up to the maximum residential density established in the Residential Official Plan; or,
 - (iv) street-related retail uses of a convenience nature, which are intended to serve the needs of local working or resident populations; or,
 - (v) buildings containing a mix of residential and street-related retail uses, provided that the residential density of the residential component of such buildings does not exceed that established in the Residential Official Plan; or,
 - (vi) buildings containing a mix of industrial and street-related retail uses; or,
 - (vii) buildings containing a mix of industrial, residential, and/or street-related retail uses, provided that the residential density does not exceed that established in the Residential Official Plan, and provided that,
 - (a) Council is satisfied that such buildings shall provide a satisfactory living environment; and

- (b) Council is satisfied that the design of such buildings has taken into account factors, such as, but not limited to, the appropriate separation of areas of car and truck activity from areas of pedestrian activity, the provision of an adequate number of parking spaces for workers, visitors, and residents, the provision of an adequate amount of shared recreation space and common outdoor space, the provision of a satisfactory noise environment for both residents and workers, and the provision of appropriate environmental controls for industrial uses contained in such buildings.

1.2.3 In passing by-laws to permit a change in use, Residential to Industrial or Industrial to Residential, in Mixed Areas, Council shall have regard for:

- (i) the advisability of retaining existing industrial buildings or uses in terms of the retention of local industrial employment opportunities and the standard of structural repair and architectural or historical merit of such buildings; and
- (ii) the advisability of retaining existing residential buildings or uses in terms of the architectural or historical merit of such buildings, and the
- (iii) the extent to which a change in use would adversely affect the continued compatibility of neighbouring uses, particularly in those areas where indentifiable pockets of a consistent use, industrial or residential, exist; and
- (iv) the provisions of the appropriate provincial legislation either governing the issuance of Certificates of Approval for industrial uses, or in any other manner regulating the standard of industrial performance.

1.2.4 Detailed secondary plans will determine the viability of introducing mixed residential-industrial land use in the residential enclaves north of the C.N.R. mainline.

1.2.5 Provision shall be made for the outside storage of manufactured spare parts for production equipment. Priority shall be given where possible to the establishment of such outside storage areas in proximity to the existing industrial buildings.

1.3 Objective

To ensure that the ultimate use of land in areas designated Restricted Industrial shall be for non-noxious industry which experience has shown to be unobjectionable to adjacent land uses.

- 1.3.1 It shall be a policy of Council to encourage the establishment of "prestige" industries in Restricted Industrial areas where the surrounding areas are complementary to such uses.
- 1.3.2 Adequate parking and loading facilities shall be ensured by all new development in the area designated for Restricted Industrial upon the land use Schedule B-1 of this Plan.
- 1.3.3 In permitting a re-zoning for industrial development within Restricted Industrial areas abutting on discordant residential zoning, provisions shall be made to establish adequate buffering between the two uses by such means as increased yards, landscaping and planting; and further provisions shall be made to control parking, storage, loading and lighting so as to minimize interference of such industrial uses with adjoining land uses.
- 1.3.4 A dwelling shall not be permitted in a Restricted Industrial area unless such a dwelling is part of, and incidental to, an industrial establishment and is essential for the satisfactory operation of such establishment.
- 1.3.5 Recreational and open space uses where practicable shall be permitted in a Restricted Industrial area provided that such uses can be located without detracting from, or hindering sound industrial development and provided that such uses have sufficient parking, buffering, nuisance controls and appropriate setting to be compatible with surrounding uses.

1.4 Objective

To maintain a diversified economic and social structure within the Central Area in order to retain industrial employment opportunities in areas having convenient access to neighbourhoods housing low to moderate income people in the City.

1.4.1 Implementation Policy

It is the policy of Council to:

- (a) encourage the retention and growth of industrial activity in appropriate areas of the Central Industrial District, and in particular in areas where industry has traditionally been located; and
- (b) seek to ensure that land is available in the Central Industrial District to accommodate the expansion of existing and future industrial development; and
- (c) employ its powers of regulation in order to designate appropriate parts of the Central Area to accommodate primarily industrial uses.

1.4.2 Since the Central Industrial District is an appropriate location for industries which derive benefit from proximity to the markets, supplied and services of the Central Core, it is the policy of Council to encourage industries to locate in areas designated for industry in the Central Industrial District.

1.4.3 It is the policy of Council to seek to improve traffic flows and access to loading facilities in areas designated for industry in the Central Area.

1.4.4 In order to alleviate congestion and the demand for parking in areas designated for industry in the Central Area, Council shall encourage access to such areas by means of public transit.

- 1.4.5 It is the policy of Council, having regard for the efficient and effective use of land and the proximity of public transit facilities, to encourage the provision of parking in areas designated for industry in the Central Area, to accommodate short-term loading and deliveries, and an appropriate amount of employee and visitor parking.
- 1.4.6 In order to protect the viability of existing industrial space, it is the policy of Council to encourage the maintenance and functional improvement of industrial buildings and to develop programs designed to assist in the up-grading and general improvement of industrial buildings and areas designated for industry in the Central Area.
- 1.4.7 It is the policy of Council to extend both the range and quality of municipal services provided in areas designated for industry in the Central Area.
- 1.4.8 It is the policy of Council to encourage the provision of, and to provide where appropriate, social services, parks and recreation facilities, which are intended to serve industrial employees and which may also serve nearby residents, in suitable locations in areas designated for industry in the Central Area.

2. Goal

To provide a more desirable environment for the Hamilton Planning area through the optimum use of its industrial lands.

2.1 Objective

To improve the efficiency and appearance of areas designated for industry by urban redevelopment schemes.

2.1.1 Implementation Policy

It is the policy of council to make provision for, among other matters, the following:

- (i) the removal and relocation of uses not permitted in areas designated for industry.

- (ii) the relocation into areas designated for industry or industries located outside such areas;
- (iii) provision of parking;
- (iv) the construction or reconstruction of roads to improve access to and convenience within areas designated for industry, and other public works contributing to the improvement of the areas;
- (v) undertaking, in co-operation with occupants of land in areas designated for industry, programs for improving the appearance and attractiveness of the areas; and

2.1.2 Council shall permit industries in areas designated for industrial use if their noxious aspects comply with the performance standards outlined in the following Acts;

- (i) Acceptable levels for emissions of sounds and vibrations as defined by the Environmental Protection Act of 1972.
- (ii) Permissible concentrations of air contaminants such as dust, smoke, fumes, odours and other particulates as defined by the Air Pollution Control Act of 1967.
- (iii) Water quality control regulations which stipulate permissible amounts of effluents as defined by the Ontario Water Resources Act.
- (iv) Industrial Waste Control as defined by the Environment Protection Act 1972 including the quality of industrial discharge and runoff.

2.1.3 In the redesignation or rezoning of a residential enclave for other than industrial use, it shall be recognized that the area has traditionally been designated and/or zoned "K" for heavy industry, and that any noise pollution by-laws concerning these areas must acknowledge the historical development of the Enclaves.

2.1.4 Council will co-operate with other levels of government to develop controls to reduce air and water pollution to an acceptable level.

- 2.1.5 In Restricted Industrial Areas Council may, subject to Section 1.1.2 pass by-laws to permit industrial buildings as uses which have a minimal environmental impact on neighbouring buildings or uses.
- 2.1.6 Council shall employ its available powers and seek the co-operation of other levels of government in order to ensure that industries in areas designated for industry in the Central Area attain a high standard of performance in terms of environmental protection.
- 2.1.7 Council shall amend the Zoning By-law so as to introduce an industrial zoning category which restricts industrial uses permitted in Mixed Industrial Residential Areas to those which are normally environmentally compatible with adjacent and neighbouring residential uses in terms of emissions, odour, noise or generation of traffic.
- 2.1.8 In so employing the Zoning By-law to permit Segregated Areas of Industry, Council shall have regard for the possible environmental effects of such concentrations on areas adjacent to Segregated Areas of Industry. In particular, Council shall seek to maintain the stability of areas designated in the Zoning By-law for such concentrations, and shall undertake measures and see the co-operation of other levels of government in order to ensure that such industries attain a satisfactory standard of environmental performance.

Local Policies for Area covered by Official
Plan Amendments 276 and 326 - East Mountain
Industrial Park

The East Mountain Industrial Park (Schedule B-2) or Official Plan Amendment 276 was approved by the Council of the Corporation of the City of Hamilton on April 25, 1972, and by the Ministry of Housing on July 3, 1974. The Industrial park was later extended by Council to the southwest to include part of Broughton East Neighbourhood in Official Plan Amendment 326, and is incorporated in this amendment as part of the East Mountain Industrial Park subject to the following policies.

- 1.1 Development Control as empowered under Section 35a of the Planning Act R.S.O., 1970 shall apply to all development within the defined boundaries of the Industrial park.
- 1.2 Site Plan Control shall be applied to those lands abutting designated conservation areas and easements.
- 1.3 Industry and ancillary uses fronting on major roads or abutting conservation areas shall be required to adhere to good architectural quality in building design and landscaping.
- 1.4 The "KK" Restricted Heavy Industrial District shall be replaced by appropriate zoning districts that satisfy the intent of the Restricted Industrial Designation.
- 1.5 The "JJ" Restricted Light Industrial District" shall be replaced by appropriate zoning districts that satisfy the intent of the Restricted Industrial Designation of this Plan.
- 1.6 The area designated Restricted Industrial in this plan shall be covered by appropriate zoning districts which satisfy the intent of the Restricted Industrial designation and ensure a compatible land use relationship with the conservation areas and with the peripheral residential neighbourhoods.

- 1.7 All commercial functions, except those highway oriented, shall be permitted throughout the area designated Restricted Industrial if said non-highway oriented commercial functions are ancillary to industrial uses.
- 1.8 Commercial functions permissible shall not include highway oriented land uses.
- 1.9 Adequate off-street parking and loading facilities shall be provided by all new development.
- 1.10 Because of the proximity to the open spaces around Albion Falls, and because of the likelihood of the cessation of a large part of the industrial activities during the week-ends and holidays, it shall be the policy of Council to permit within the areas designated Restricted Industrial upon the land use schedule of this Plan the placement of premises for clubs and/or of similar institutions, catering to leisure time activities.
- 1.11 No industrial building or process shall be permitted within 300 feet of any structure on properties used solely for residential purposes, if the said structure is located within the East Mountain Industrial Park delimited upon Schedule B-1 of this Plan.
- Cemeteries existing in 1970 in the area designated for Restricted Industrial land uses shall be permitted to remain for an indefinite period of time.
- In the areas designated for Restricted Industrial on the land use plan, Council shall regulate the location and appearance of signs.

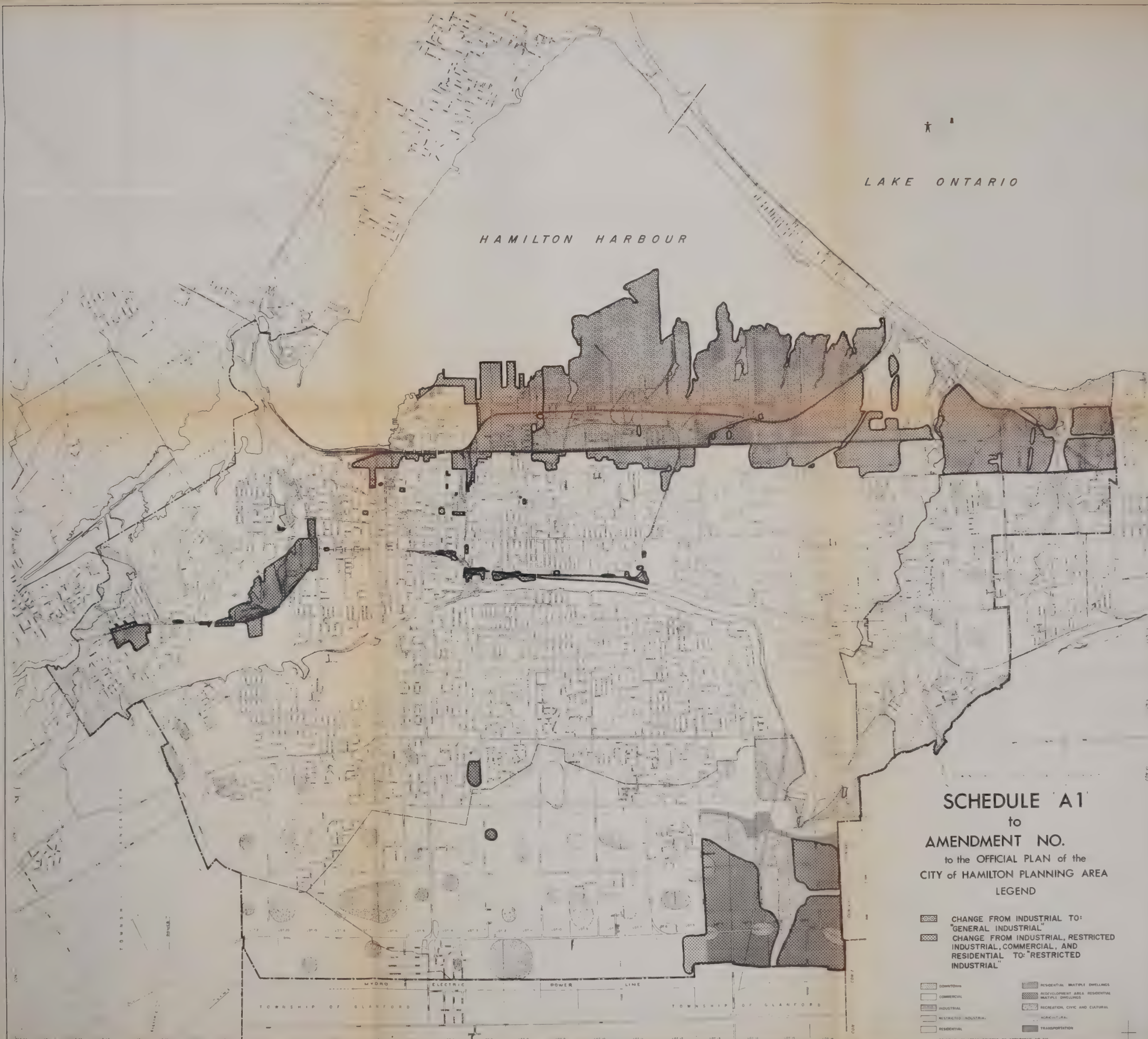


LAKE ONTARIO

HAMILTON HARBOUR

SCHEDULE 'A1'
to
AMENDMENT NO.
to the OFFICIAL PLAN of the
CITY of HAMILTON PLANNING AREA
LEGEND

- | | |
|--|--|
| CHANGE FROM INDUSTRIAL TO:
"GENERAL INDUSTRIAL" | RESIDENTIAL MULTIPLE DWELLINGS |
| CHANGE FROM INDUSTRIAL, RESTRICTED
INDUSTRIAL, COMMERCIAL, AND
RESIDENTIAL TO "RESTRICTED
INDUSTRIAL" | REDEVELOPMENT AREA RESIDENTIAL
MULTIPLE DWELLINGS |
| DOWNTOWN | RECREATION, CIVIC AND CULTURAL |
| COMMERCIAL | AGRICULTURAL |
| INDUSTRIAL | TRANSPORTATION |
| RESTRICTED INDUSTRIAL | |
| RESIDENTIAL | |
| BOUNDARY OF AREAS COVERED BY AMENDMENT NO. 228 | |





HAMILTON HARBOUR

LAKE ONTARIO

SCHEDULE B-1

AREAS OF RESTRICTED INDUSTRIAL

LEGEND




-  AREAS OF RESTRICTED INDUSTRIAL TO BE REVIEWED BY DETAILED SECONDARY PLANS
-  INDUSTRIAL AREA TO BE INCLUDED IN A FUTURE OFFICIAL PLAN AMENDMENT CONCERNING THE WATERFRONT

HAMILTON HARBOR

SCHEDULE B-2

SPECIFIC POLICY AREAS

LEGEND

-  AREAS TO BE REVIEWED FOR CENTRAL AREA INDUSTRY
-  RESIDENTIAL-ENCLAVE STUDY AREA
-  EAST MOUNTAIN INDUSTRIAL PARK

SECTION 111 APPENDIX

THE APPENDIX IS NOT PART OF THE OFFICIAL PLAN.
THE PURPOSE OF THIS APPENDIX IS TO MAKE AVAILABLE
TO THE READER SOME OF THE INTERESTING SUPPORTIVE
BACKGROUND MATERIAL WHICH WOULD MAKE THE STUDY
OF THE OFFICIAL PLAN MORE MEANINGFUL.

APPENDIX

CHAPTER I - INTRODUCTION

1.1 Why Industry

Industry has customarily been a major cohort of municipal growth. In communities across Canada, the desirability of growth is being re-examined, often with the revelation that traditional growth generating forces have either abated or been replaced by other elements within the economy.

Whether by the inherent physical limitations of Hamilton, changing market conditions or a shift to a service economy, industry is declining in terms of relative growth and as a percentage of the overall labour force.

Nonetheless it remains a mainstay of the local economy and, if directed by informed policy makers, may well be suited to greater growth in the next 10 or so years than many of the area municipalities with which it is in direct competition.

For although the service economy appears the forerunner of the post industrial society, it is largely a function of the population it serves, together with certain provincial policies, and is thus dependent on the growth of the population within the city's service area. As this area is well defined by virtue of its consistency over the years, its role as an agent for growth in the Hamilton economy will be qualified in proportion to the population growth this area undergoes.

Industrial activity on the other hand has an established market area beyond that of its service counterpart. One that grows in accordance with a much larger market, primarily Southern Ontario, but as far ranging as national or even international consignments. If the types of industry with the potential to locate or expand in the City of Hamilton serve this larger market area, and are not in existence to satisfy what is principally local demand, then the prospect of industrial expansion may well generate additional growth as a consequence of more than the initial local market.

As such, industry remains desirable in that it;

- Provides employment directly in manufacturing;
- Bolsters the local retail and services market through the wages and salaries paid to those directly employed in manufacturing;
- Furnishes additional support to the local economy through the purchases of materials and services necessary for the manufacturing process;

- Provides the basis for additional employment opportunities in local trade, service, construction, and supply establishments;
- Makes a more than proportionate return to the community in terms of real property taxation which permits:
 - a lightening of the tax burden on individual property owners; * and
 - a more extensive range of community services than would otherwise be possible.

* On Taxation

A frequent argument is that industry must be attracted to reduce the burden on the local taxpayer. The argument being that, since industries pay more taxes than the cost of providing services to them, more industry means lower taxes. It is an attractive argument in a period when real property taxes, on which municipal governments primarily rely, have been increasing rapidly. It contains an element of truth because many, but not necessarily all industries do pay more taxes than the direct cost of the municipal services they receive. Conversely, local governments do not usually recover from taxes on residential property the full cost of providing services to them. Insofar as new industry means additional population and additional services it may actually bring an increase in the general tax rate. The relationship between taxes paid by an industry and its employees and the cost of servicing them depends on a large number of factors, and even in specific cases the net effect is difficult to determine accurately.

The advantage to a municipality more commonly results, however, when industry is located in one municipality but its employees live elsewhere. In these circumstances one area municipality may have markedly less industrial assessment and have a narrower tax base or more demands for services than the other.

As Hamilton's available industrial acreage becomes increasingly limited, it is essential that the city make efforts to encourage those industries that:

1. broaden and diversify the economic base.
2. utilize more than just the local market, thus increasing the potential for greater overall long term expansion.
3. fortify the city against severe cyclical and seasonal fluctuations.
4. have a high degree of employment stability.
5. use or process locally available raw or semi-processed materials.
6. provide employment opportunities for those people presently unable to find work.
7. are functionally interdependent and compatible with existing establishments.

As well it is advisable to re-assess the types of industry the city should encourage in light of the heavy demand presently placed on the environment by this sector.

1.2 History

The predominance of industry in Hamilton's skyline is the result of a combination of locational and historic factors.

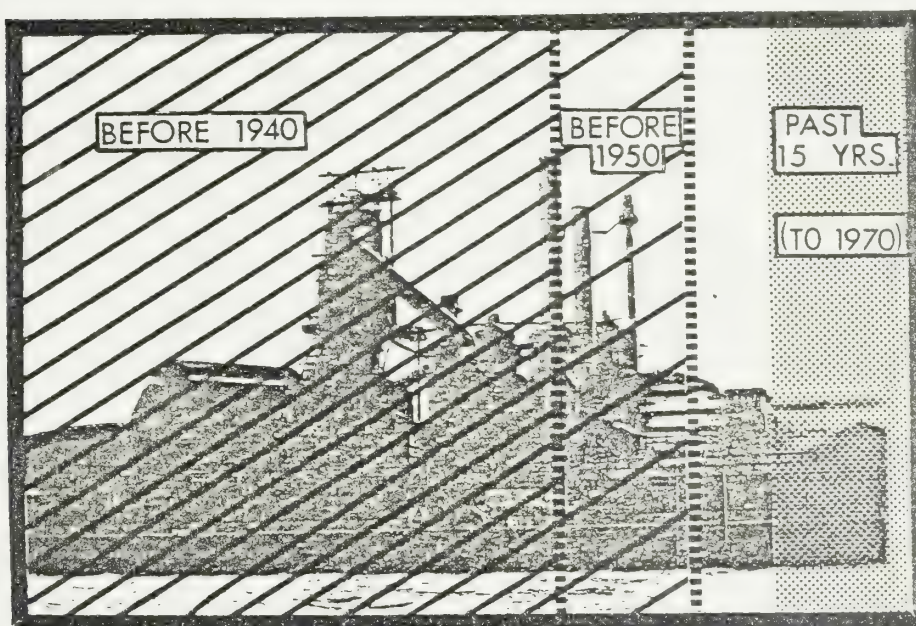
To depict this industrial growth in its proper perspective, it is necessary to determine both the foundation date of each plant and the rationale for locating in the City.

In the Manufacturing Survey undertaken by the City of Hamilton Planning Department in 1969, it was observed that many of the plants were founded in the first two decades of this century when the "Head of the Lake" had numerous locational advantages.

As illustrated in Figure 1, 3 of every 4 plants responding to the survey were established by 1950, with only 16% of the sample (80 plants) having located in the past 15 years to 1970.

Figure 1.

DATE OF FOUNDING - MANUFACTURING SURVEY



When asked the reasons for selecting Hamilton, 60% of the respondents mentioned that the founder was of "local origin" although inherently was attracted to the site favoured by the industrial location factors that so characterized Hamilton at that time, namely:

- proximity to materials, labour and markets
- access to transportation systems
- availability and cost of land.

One quarter of the respondents indicated proximity to other manufacturers as a locational attraction, demonstrating that these initial sitings served as a catalyst for the development and growth of ancillary industries

Thus, this spin-off effect gave rise to the agglomeration economy that is the Bay Front, as evidenced by the number of value added linkages among the existing plants.

1.3 An Overview of the Hamilton Economy

Traditionally, the economic structure of the City of Hamilton has been dominated by the manufacturing sector which in 1961 employed 41.7% of the resident labour force. Recent years have witnessed a decline in the importance of manufacturing and an increase in that of the service sector. Consequently, in 1971, manufacturing accounted for 36.4% of the city's residential labour force while services, public administration and finance accounted for 31% up from 26%. *

Perhaps more significant than the proportion of total jobs are the proportion of new jobs. Residential manufacturing employment over the ten year period from 1961 to 1971 increased by only 3,300 for the City of Hamilton while the service sector experienced an increase of some 13,000, growing nearly four times faster than its counterpart.

The shift to the service sector is prevalent on a metropolitan, provincial and even national scale. Figure 2 depicts the expansive nature of this phenomenon in the Hamilton and Toronto Metropolitan areas.

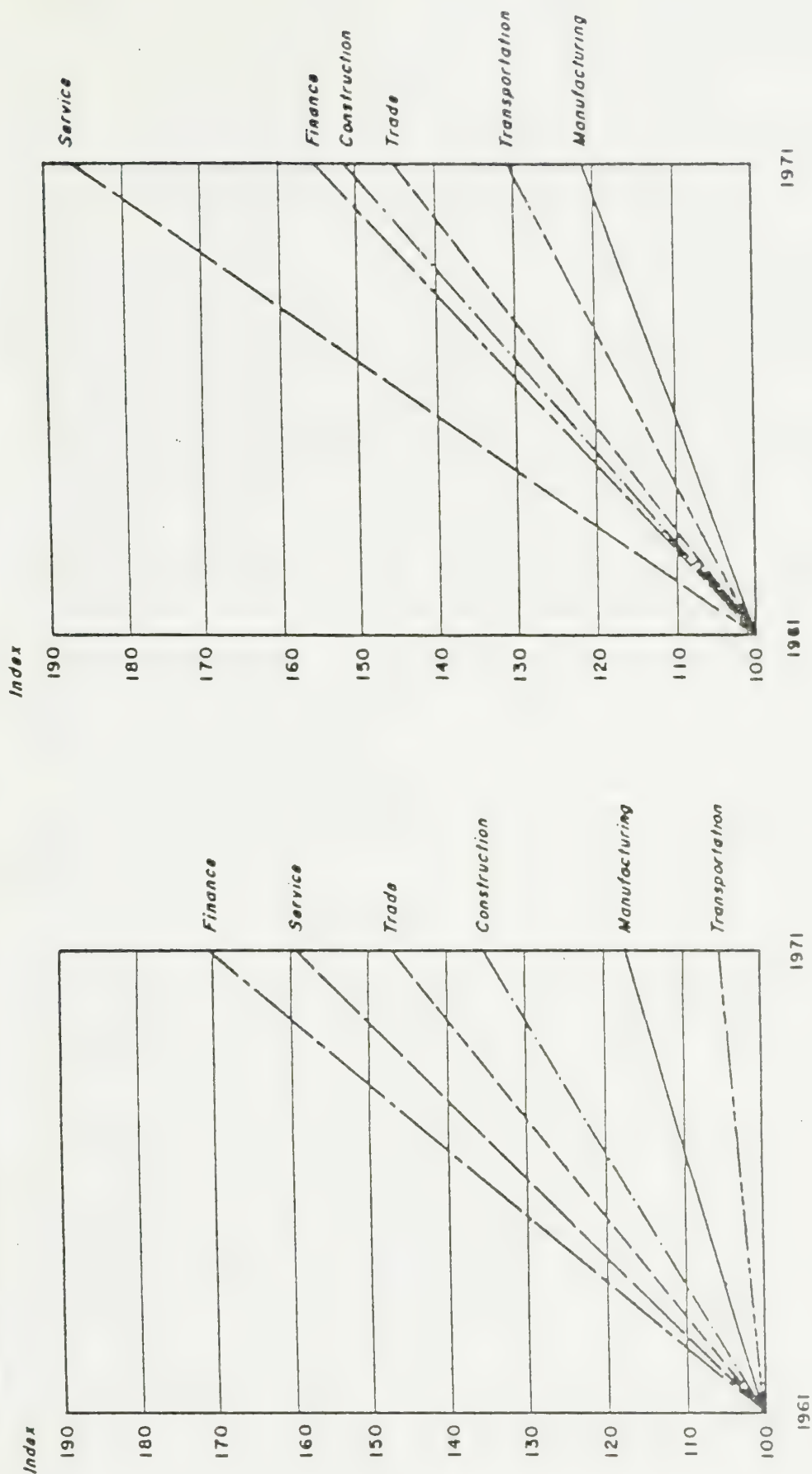
This decline in manufacturing is of further concern to Hamilton in that the city is faced with inherent physical limitations to accomodate the expansion of the industry that so characterizes the Bay Front. Much has been done, however, to facilitate the interests of light industry with the conception of the 725 acre East Mountain Industrial Park.

The manufacturing industries of the city market most of their products within Canada, particularly the Toronto-Hamilton area, and will most probably grow in accordance with this market.

Hamilton's economic base then, while still resting heavily on manufacturing, and notably the steel industries, is fast becoming more diversified. Hamilton will likely be dominated by a service economy by the next census, entering a new era of development.

* Based on census material

HAMILTON METROPOLITAN AREA



TORONTO METROPOLITAN AREA

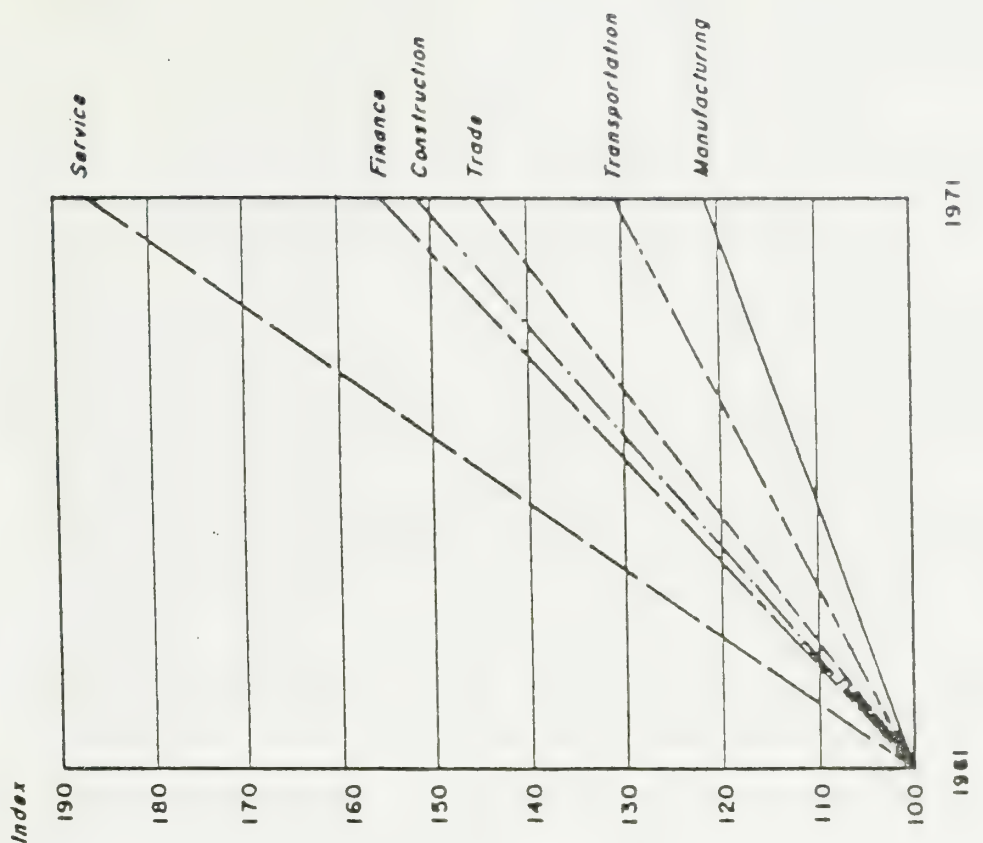


Figure 2 Employment Indices by Economic Sectors (1961 = 100)

Source: Census of Canada.

* Percentage increase in the number of persons employed in each of the economic sectors between 1961 - 1971.

Chapter 2

EMPLOYMENT AND INDUSTRIAL DEVELOPMENT TRENDS 1951 - 1975

2.1 Introduction

Any attempt at forecasting future employment and land development must have an appreciation of past economic trends. One valuable overall indication of industrial performance is the employment levels of respective industries. This chapter documents the employment structure of the City of Hamilton for the years 1951 - 1975. An appreciation of more recent developments was obtained, courtesy of the Regional Planning Department's 1971 - 1975 Business Survey.

In addition, a synopsis of those lands presently used or zoned for industry is included, together with the evolvement of the current industrial planning and land development framework.

2.2 Employment Trends for Hamilton, 1951 - 1975

Employment statistics for the City of Hamilton are available by both place of residence (workers) and place of work (jobs.) The latter was first tabulated in 1971 and as such cannot be compared with preceding years. Consequently, employment by place of residence has been selected to portray the course of manufacturing in the Hamilton economy.

Total Employment for the resident labour force of Hamilton grew by 14.3% from 1951 - 1961, and by 23.1% from 1961 - 1971. Manufacturing employment in contrast declined by almost 12 percent during the 1951 - 1961 period, recovering sufficiently to register a gain of some 7 percent by 1971. Even so, as a percentage of the overall labour force, manufacturing declined for both periods, totalling a drop of 17.6 percent.

Table 1 illustrates the changes in labour force, by industrial division and sex, for the City of Hamilton for the years under discussion.

A comprehensive assessment of the trends in manufacturing can only be acquired after studying the respective differences of detailed industrial divisions. Table 2 reveals which of these sub-groupings have experienced an increase or decrease in their residential work force.

Employment statistics per se, however, can be misleading. This is especially true of manufacturing, where technological innovations and increased mechanization have enabled growth in terms of real productivity without a corresponding expansion of the labour force.

Greater insight is thus afforded by comparing employment levels with the number of establishments in operation and their collective value of production in 1961 dollars.

Certain of these industries have been monitored in this respect since 1961, when Statistics Canada began the annual Manufacturing Survey (cat. 31-209). Employment is tabulated by number of jobs and thus differs somewhat from trends in the city's residential labour force. The following graphs are perhaps a better indication of the overall performance of various industries in the City of Hamilton. (Figure 3)

It is interesting to note that production in the Food, Furniture, Printing, Metal Fabricating and Non-metallic Mineral Products categories has risen independently of the level of employment, suggesting that these industries are experiencing greater output through improved technology. Others such as Wood and Clothing industries demonstrate a strong co-relation between the number of employees and productivity. Growth in an industry that exhibits the latter characteristic would thus generate more jobs per sales dollar than would a more technologically-oriented firm. Such labour intensive industries serve to enhance the employment prospects of the local community and should thus be protected.

Statistics Canada provided the consumer price index for 1966 (111.4) and 1971 (133.4).

Synopsis

Total Manufacturing Industries

This general index is more stable than those for specific industry groups. The rate of growth in overall manufacturing employment from 1961 to 1971 was approximately half the rate of growth for production.

The general implication of the disparity between the growth in employment and production is that increased production can be achieved with little or no increase in employment. The fact that this becomes particularly evident after 1966 may be the consequence of the period of very rapid capital formation in machinery and equipment up to 1966. The increase in production would have been achieved by using the capacity of new equipment rather than by employing more staff. In that case a rapid increase in machinery from this period onwards could have similar implications for future employment.

TABLE 1
COMPARISON OF CHANGES IN LABOUR FORCE, BY INDUSTRIAL
DIVISION AND SEX, FOR THE CITY OF HAMILTON,
1951-61, 61-71, and 51-71

Industry	1951-61	1961-71	1951-1971			% Change Overall L.F.
	% Change	% Change	Total %	Male %	Female %	
All Industries	+ 14.3	+ 23.1	+38,735(41)	17,900(46)	20,835(54)	
Primary	+103.4	+ 28.5	+ 571(161)	272(48)	299(52)	+ 0.3
Manufacturing	- 11.7	+ 7.3	- 2690(5.2)	- 353(13)	- 2337(87)	- 17.6
Construction	+ 34.1	+ 8.5	+ 2616(46)	2360(90)	256(10)	+ 0.2
Transportation (Storage), Communication and Utilities	+ 16.1	- 0.6	+ 885(15)	568(64)	317(36)	- 1.0
Trade	+ 28.6	+ 10.9	+ 5698(43)	1894(33)	3804(67)	+ 0.1
Finance, Insurance and Real Estate	+ 48.2	+ 49.7	+ 2778(122)	1002(36)	1776(64)	+ 1.4
Community, Business and Personal Service Industries	+ 70.4	+ 48.6	+19,345(153)	6982(36)	12,363(64)	+ 10.6
Public Adminis- tration and Defense	40.9	+ 18.3	+ 1887(66)	1139(60)	775(40)	+ 0.7
Unspecified	-	-	-	-	-	+ 5.4

Sources: 1951 Census of Canada Vol. 1V

1961 Census of Canada Vol. 3.2-1

1971 Census of Canada Vol. 3.4 Cat. 94-740

TABLE 2

Comparison of Changes in Manufacturing Labour Force by Detailed Industrial Division and Sex for the City of Hamilton, 1951-61, 1961-71, 1951-71

Industry	1951-61 % Change	1961-71 % Change	1951-71		% Change Manufacturing Labour Force	
			Total %	Male % Female %		
All Manufacturing	-6013(11.7)	+3323(7.3)	-2690(5.2)	-343(13)	-2337 (87)	
Foods and Beverages	+ 59.2	- 7.5	+1218(47)	506(42)	712 (58)	+ 2.8
Tobacco Products	+ 8.3	- 88.5	- 350(88)	-129(37)	- 221 (63)	- 0.7
Rubber and Plastics	- 4.1	+ 18.2	+ 166(14)	121(73)	45 (27)	+ 0.5
Leather Products	+ 65.2	+ 40.7	+ 262(132)	- 39	+ 301	+ 0.5
Textiles (excl. clothing)	- 43.4	+ 13.3	- 966(36)	-637(66)	- 329 (34)	- 1.7
Clothing (incl. knitting)	- 67.2	+ 18.8	-2205(61)	-905(41)	-1300 (59)	- 4.1
Wood Products	- 36.0	- 37.1	- 274(60)	-247(90)	- 27 (10)	- 0.5
Furniture & Flxtures	NA	NA	NA	NA	NA	NA
Paper Products	- 1.8	- 4.5	- 77(6)	- 1(1)	- 78 (99)	0
Printing & Publishing	+ 25.6	- 8.7	+ 165(15)	28(17)	137 (83)	+ 0.4
Iron and Steel	NA	NA	NA	NA	NA	NA
Primary Metal	NA	+ 40.6	NA	NA	NA	NA
Metal Fabricating	NA	- 8.2	NA	NA	NA	NA
Machinery	NA	- 20.4	NA	NA	NA	NA
Non-Ferrous Metal	NA	NA	NA	NA	NA	NA

continued

<u>Industry</u>	<u>1951-61 %Change</u>	<u>1961-71 %Change</u>	<u>1951-71</u>			<u>% Change Manufacturing Labour Force</u>
			<u>Total %</u>	<u>Male %</u>	<u>Female %</u>	
Transportation Equipment	- 37.7	+ 19.6	- 841 (26)	- 826 (98)	- 33 (2)	- 1.4
Electrical Products	- 39.4	- 10.6	-3760 (46)	-2442 (65)	- 1318 (35)	- 6.9
Non-Metallic Mineral	+ 15.2	- 11.5	+ 38 (2)	- 86	+ 124	+ 0.3
Petroleum Products	- 60.0	+ 40.8	- 114 (44)	- 132	+ 18	- 0.2
Chemical Products	+ 12.7	+ 9.2	+ 283 (23)	215 (76)	68 (24)	+ 0.7
Miscellaneous	- 26.6	NA	NA	NA	NA	NA

Sources: 1951 Census of Canada Vol. IV
1961 Census of Canada Vol. 3.2 - 1
1971 Census of Canada Vol. 3.4 Cat. 94-740

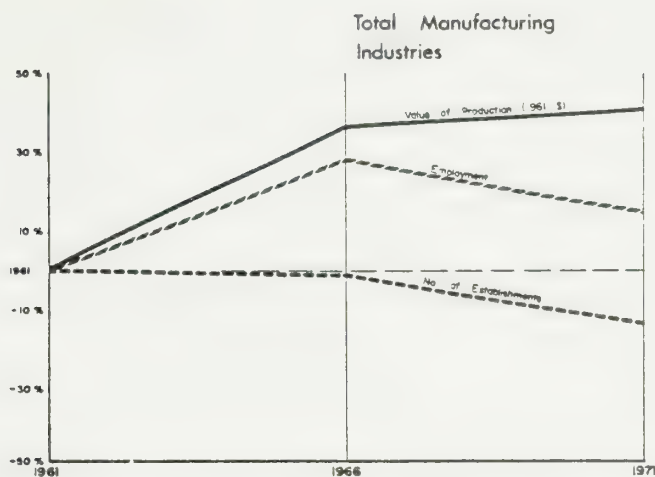
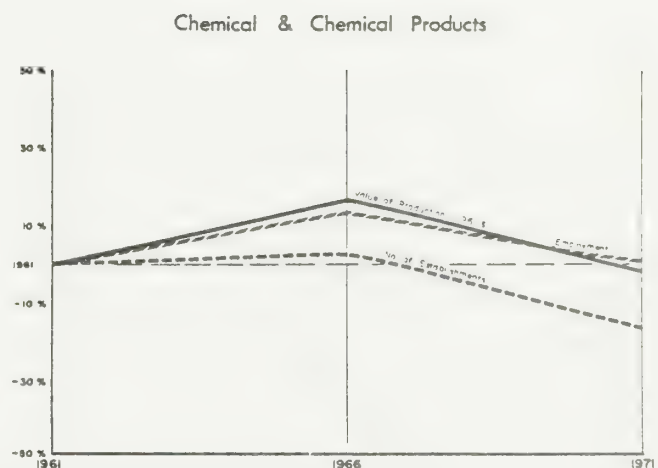
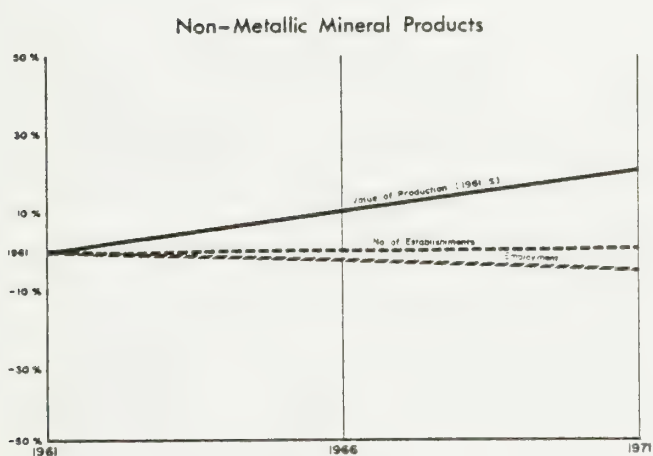
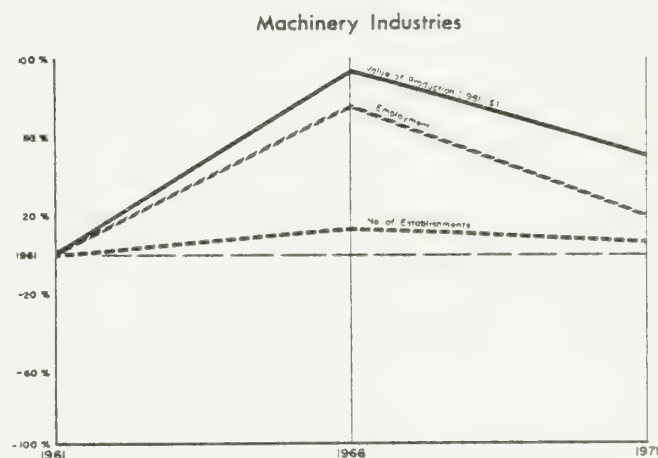
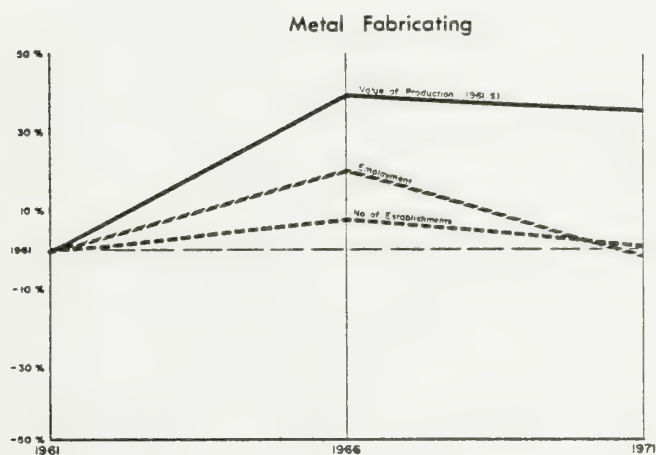
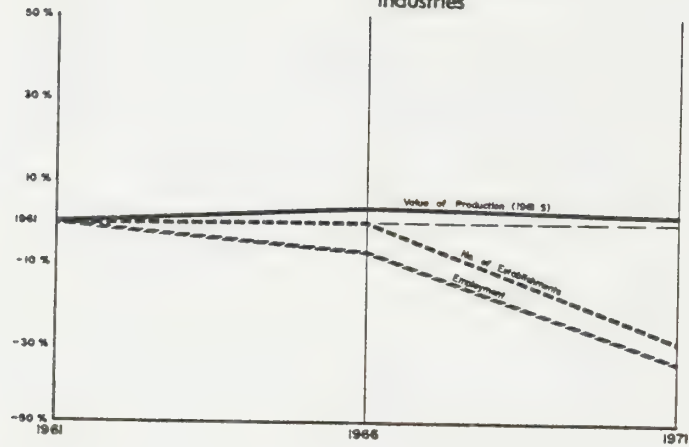


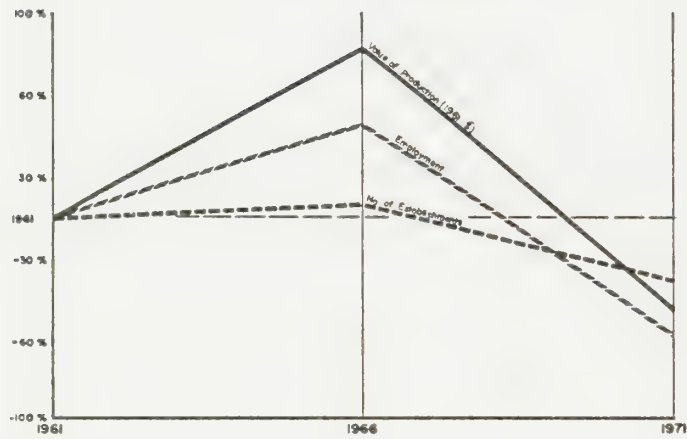
Figure 3 - Value of Production, Number of Establishments, and Employment Indexes by Detailed Industrial Division for the City of Hamilton, 1961 - 1971



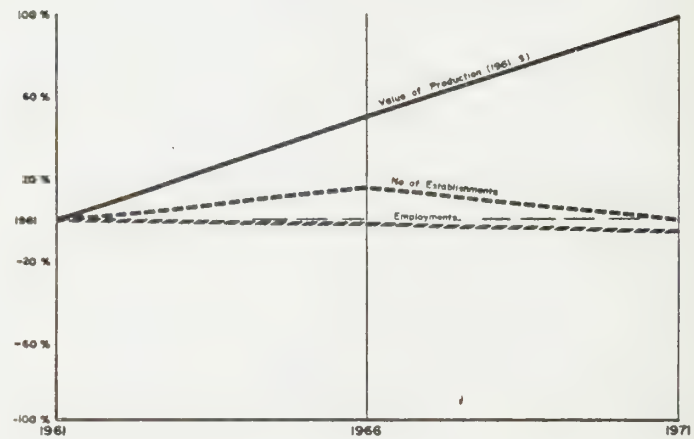
SOURCE: DERIVED FROM MANUFACTURING INDUSTRIES OF CANADA; GEOGRAPHICAL DISTRIBUTION 1971, CATALOGUE 31-209, STATISTICS CANADA.

Food & Beverage
Industries

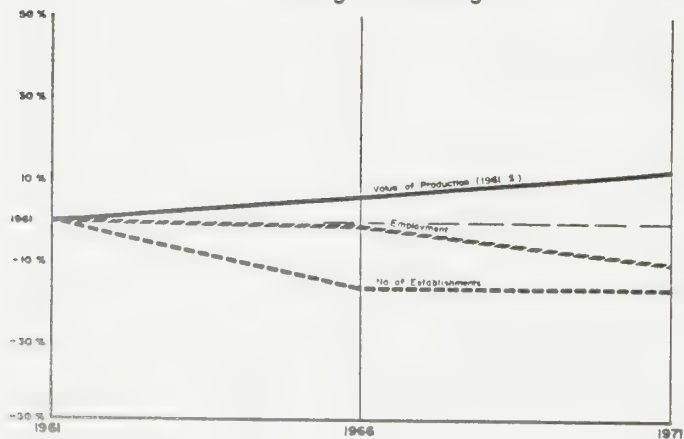
Wood Industries



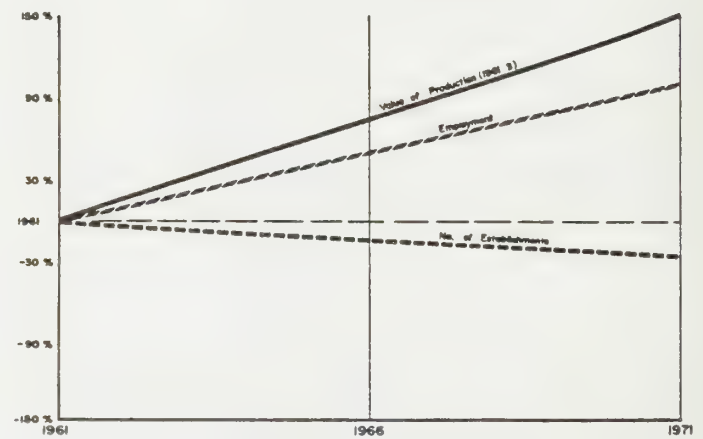
Furniture & Fixtures



Printing & Publishing Etc.



Clothing Industries



Recent Developments - 1971 - 1975

The time and effort required to collect and accurately process data often makes it difficult to assemble a frame of reference from which to evaluate the latest trends.

With the co-operation of the Manufacturing and Primary Industry Statistics Section of the Ministry of Treasury, Economics and Intergovernmental Affairs, it was possible to complement the research of the Region's 1975 Business Survey. These two sources furnished a valuable insight into which of the area's industries are expanding together with an indication as to where this growth is taking place.

Table 3 illustrates the distribution of employment change by detailed industrial division for the City of Hamilton. According to the 1975 Business Survey, the city registered an overall increase of over 6,000 jobs from 1971 to 1975, predominantly in the Primary Metals, Machinery, Metal Fabricating, and Food and Beverages Industries.

The Census of Manufacturers report published by the Ministry of Treasury, Economics and Intergovernmental Affairs indicates a similar trend for the years 1966 - 1972 (further years not yet available). As this report documents both the date of establishment and number of employees annually, it is possible to ascertain which industrial sub-groups are growing in terms of additional plants. This is significant as initially, many of the newer firms employ only several persons. Annual employment records also furnish an insight into the overall performance of these industries.

It is interesting to observe the patterns that develop among various types of industries. The locational requirements of certain industries are such that the entire regional hinterland serves as a potential site for a new facility. During this period for example, only 12 of the 35 metal fabricating establishments that commenced operations within the region did so within the City of Hamilton. The remainder located in Stoney Creek (11), Burlington (10) or elsewhere, suggesting that other area municipalities are in a position to provide the land, labour, and access (both to raw materials and markets) required. Others, exhibit a strong correlation with the economic advantages associated with a concentrated and centralized



TABLE 3

INCREASE IN MANUFACTURING EMPLOYMENT BETWEEN 1971 AND 1975 BY PLANNING DISTRICTS, CITY OF HAMILTON

INDUSTRY	PD62	PD64	PD65	PD66	PD67	PD68	PD75	TOTAL EMPLOYMENT CHANGE BY INDUSTRY
Food and Beverages	354	-	104	46	62	-	-	566
Tobacco Products	-	-	-	-	-	-	-	-
Rubber and Plastics	33	153	-	-	-	-	-	186
Leather Products	-	-70	-	-	-	-	-	-70
Textiles	-4	85	-	-14	-	-	-	67
Knitting Mills	-	-	-	-	-	-	-	-
Clothing	-10	-	-	1	10	-	-	1
Wood Industries	-1	-	-	18	-	-	-	17
Furniture & Fixtures	9	-	-	-	-	-	-	9
Paper and Allied Industries	15	14	4	-10	43	-	-	66
Printing and Publishing Industries	-158	-	154	-14	54	-	-	36
Primary Metals Industry	3500	188	-	-2	519*	17	-	4222
Metal Fabricating	241	91	18	-17	79	76	-	488
Machinery	663	14	18	-	-	7	24	726
Transportation Equipment	-101	-	9	1	-	-	-	-91
Electrical Products	7	-	-	-72	3	-190	-	-252

<u>INDUSTRY</u>	<u>PD62</u>	<u>PD64</u>	<u>PD65</u>	<u>PD66</u>	<u>PD67</u>	<u>PD68</u>	<u>PD74</u>	<u>TOTAL EMPLOYMENT CHANGE BY INDUSTRY</u>
Non-metallic Mineral	84	24	3	-20	-	51	-	142
Petroleum and Coal Products	23	-	-	-	-	-	-	23
Chemicals and Chemical Products	188	-	-	-	-	16	-	204
Miscellaneous	17	10	-	-	2	-	-	29
Total Employment Change By Planning District	4860	509	310	-83	772	-23	24	6369

* This increase consists of office employees located in Stelco Tower.

Source: Regional Planning Business Surveys, 1971 and 1975

location. Thus, 15 of the 23 Printing and Publishing Industries originating during 1966 - 1972 selected Hamilton as the site for their operation.

The shortage of industrial land in the lower city has resulted in the relocation of many firms. For those industries with alternative sites within the region, the problem has been surmountable. However, as illustrated by the dependency of some industries on an inner city location, provision must be made to accommodate their interests if we are to ensure the local labour force upon which they often rely with employment opportunities.

COMMUTING

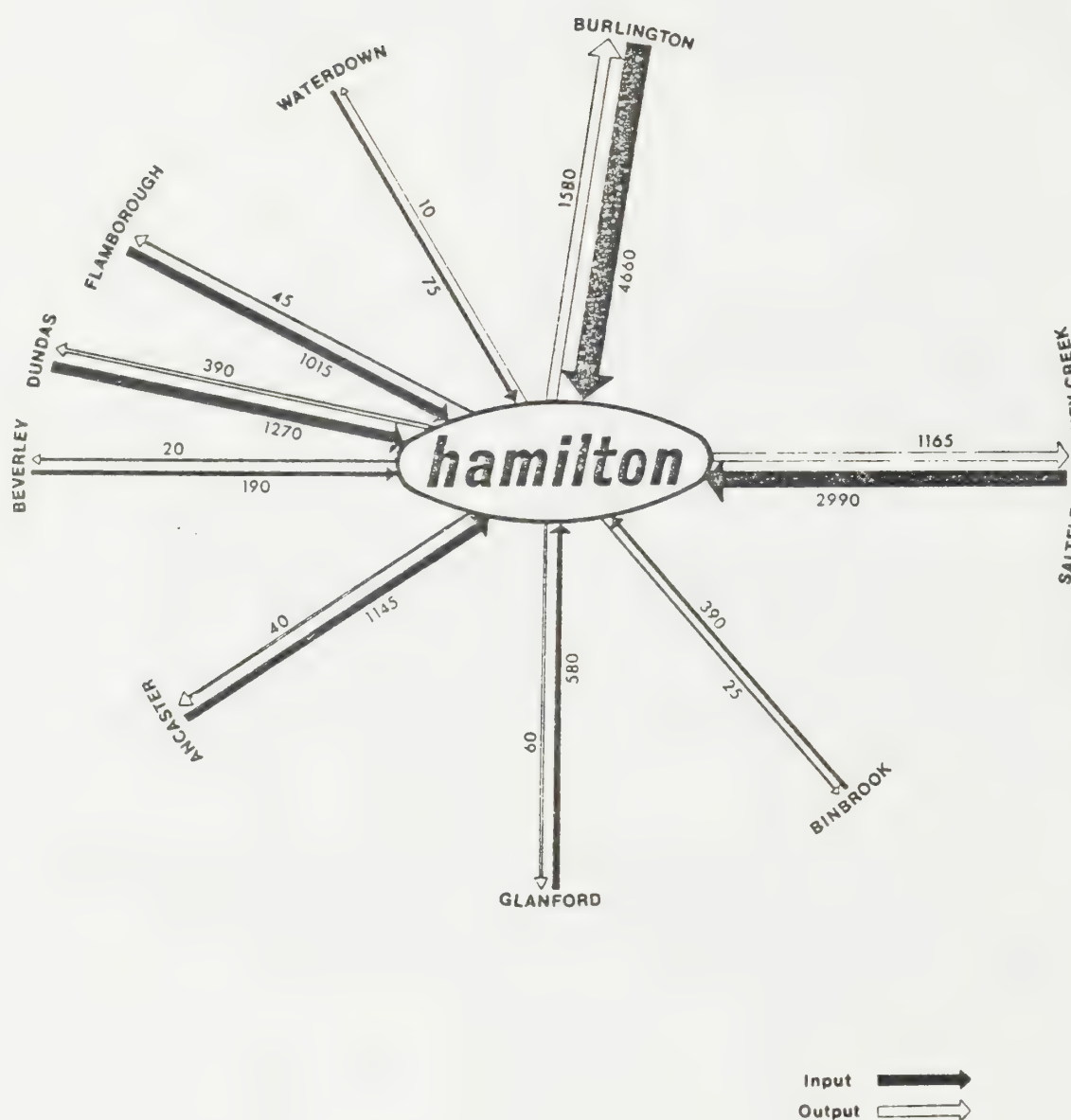
Figure 5 illustrates the extent to which Hamilton serves the surrounding area as an employment centre. In 1971, a total of over 12,000 persons commuted from various area municipalities to a manufacturing job in Hamilton. Conversely, some 3,000 Hamiltonians are employed in a manufacturing position outside of the city limits, primarily Burlington (1580) and the Saltfleet-Stoney Creek area (1165).

So as to provide a more detailed analysis of the journey to work for manufacturing employment, Hamilton was divided into relatively homogeneous residential areas and cross-referenced with each of the city's six employment nodes. Data for this comparison was derived from the Region's (1% sample) Transportation Study. As employment was not classified by industrial division for the purposes of this study, those transportation districts characterized by high levels of manufacturing activity were selected as employment nodes.

The origin of the labour force for each of Sectors 1 - 5 and 7 are depicted on the following pages. (Figure 6). It is interesting to note the high incidence of workers employed locally for the Barton Street sector which suggests a significant dependency by many industries on the immediate labour pool.

Figure 5

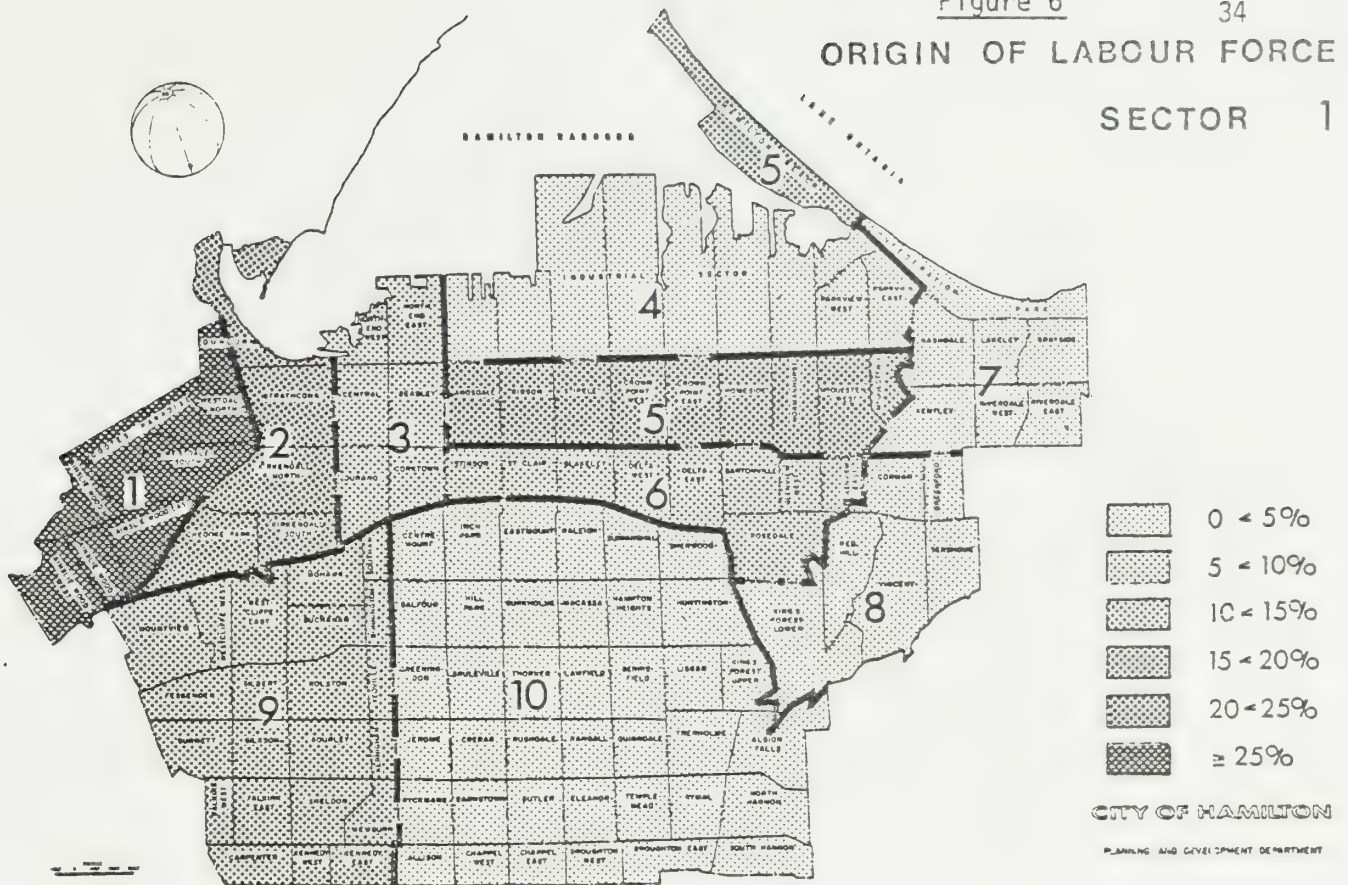
LEVELS OF COMMUTING FOR MANUFACTURING INDUSTRIES HAMILTON AND AREA, 1971



SOURCE: Census of Canada 2695-28-1971
 Place of work of total employed labour force in selected areas of Ontario by major industrial divisions.

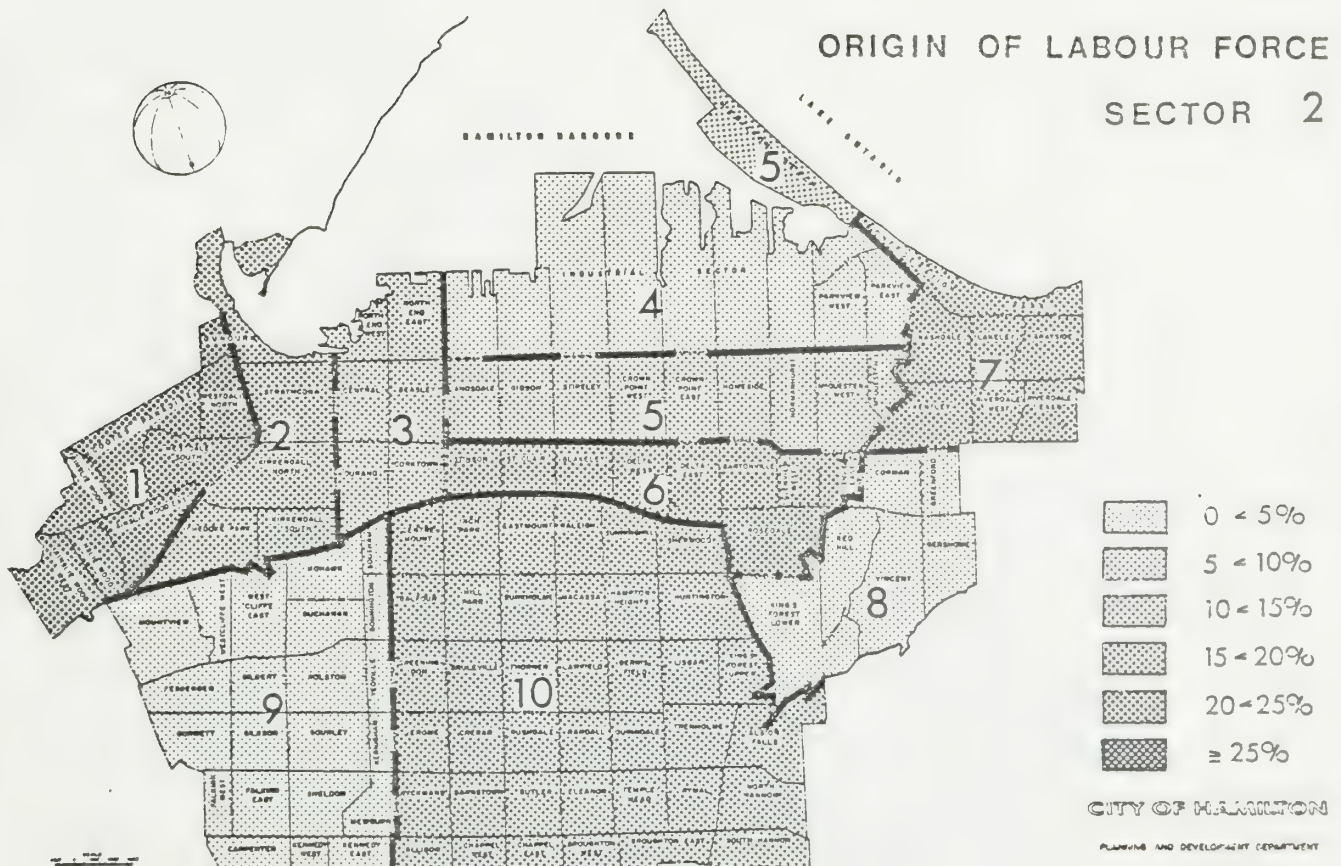
ORIGIN OF LABOUR FORCE

SECTOR 1

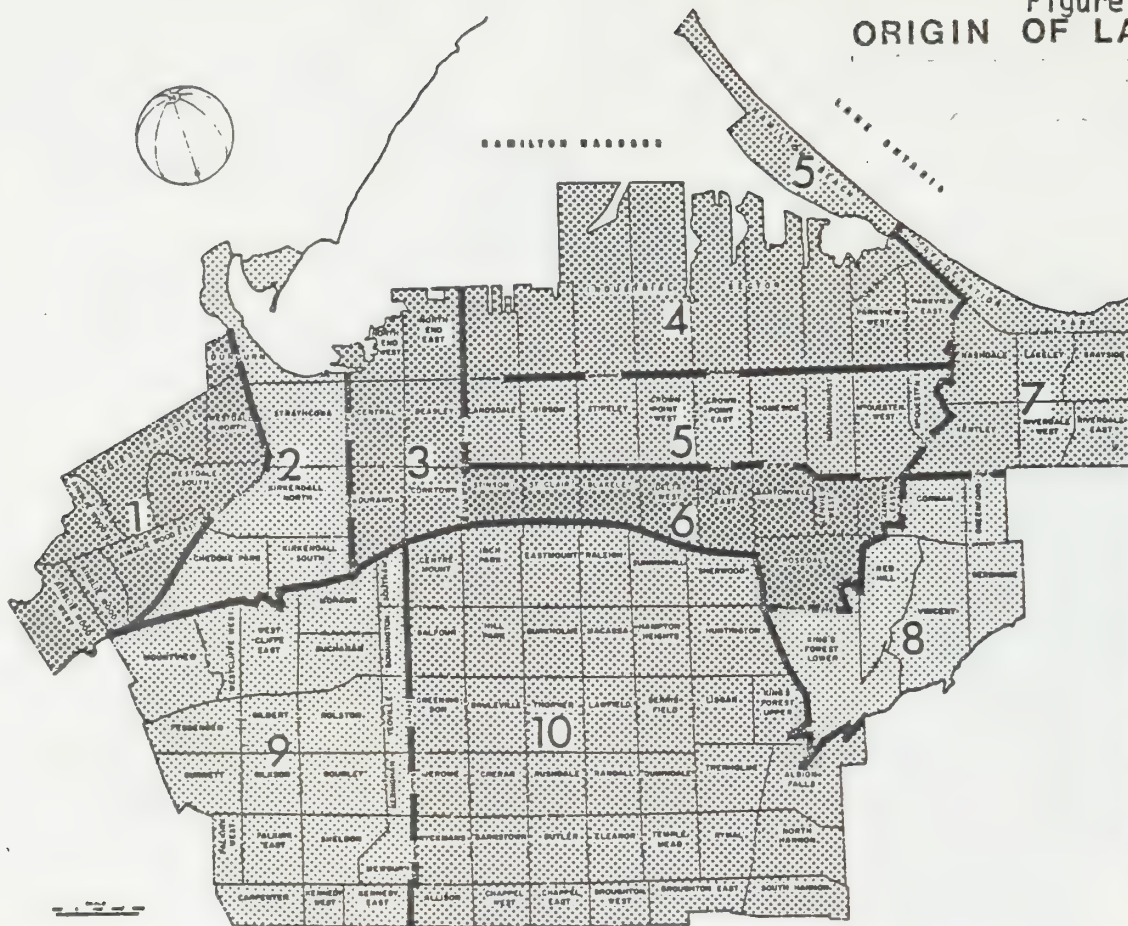


ORIGIN OF LABOUR FORCE

SECTOR 2



SECTOR 3



ORIGIN OF LABOUR FORCE

SECTOR 4

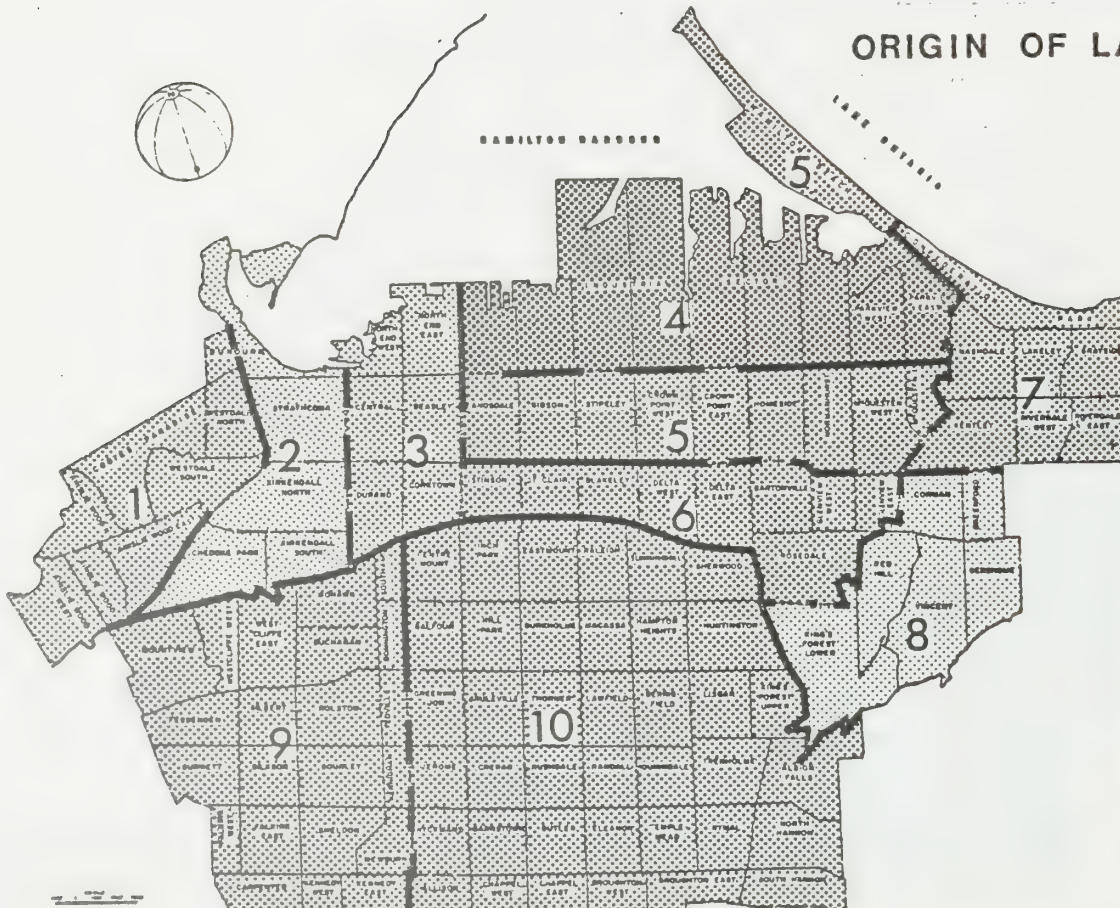
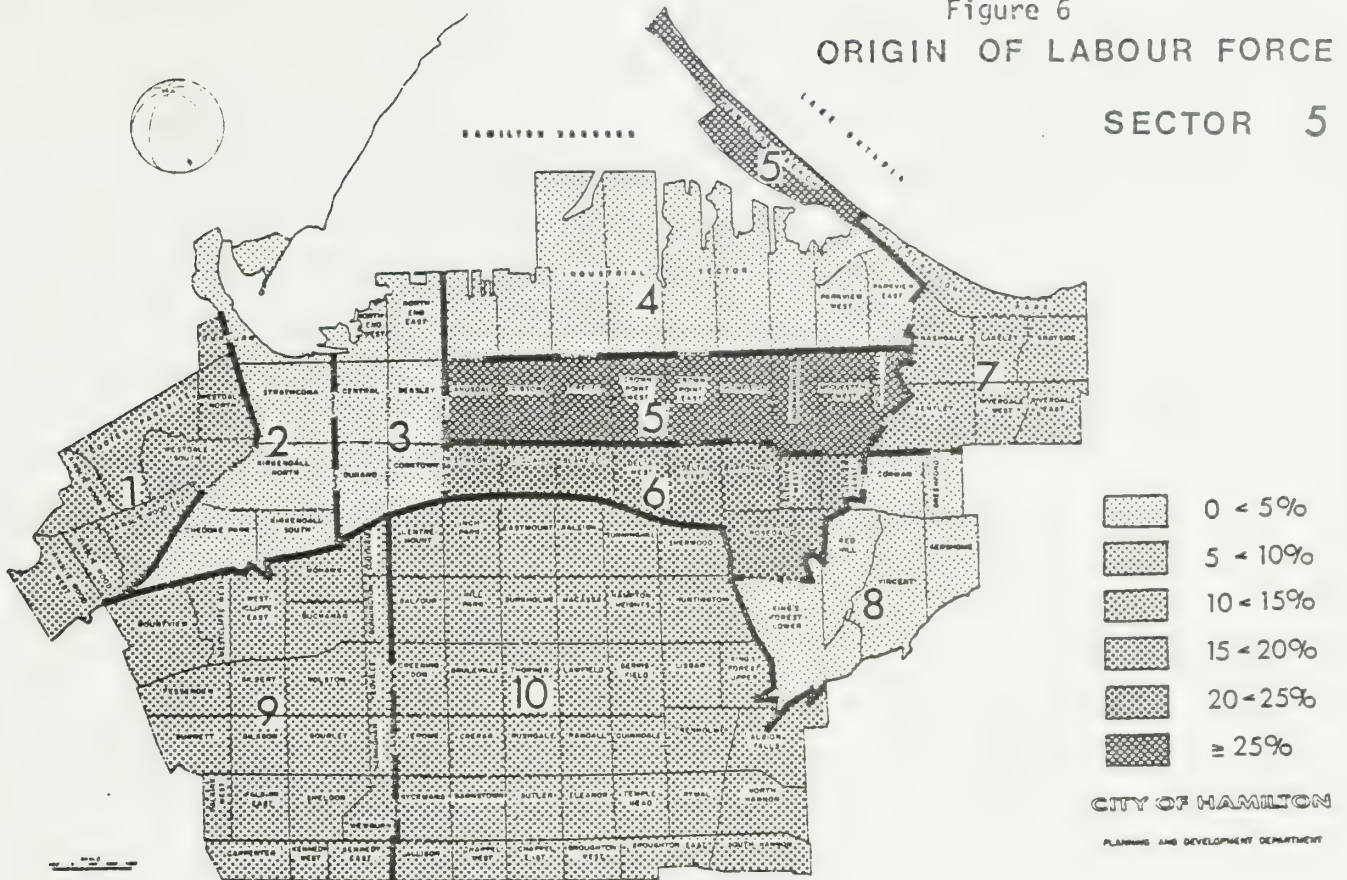


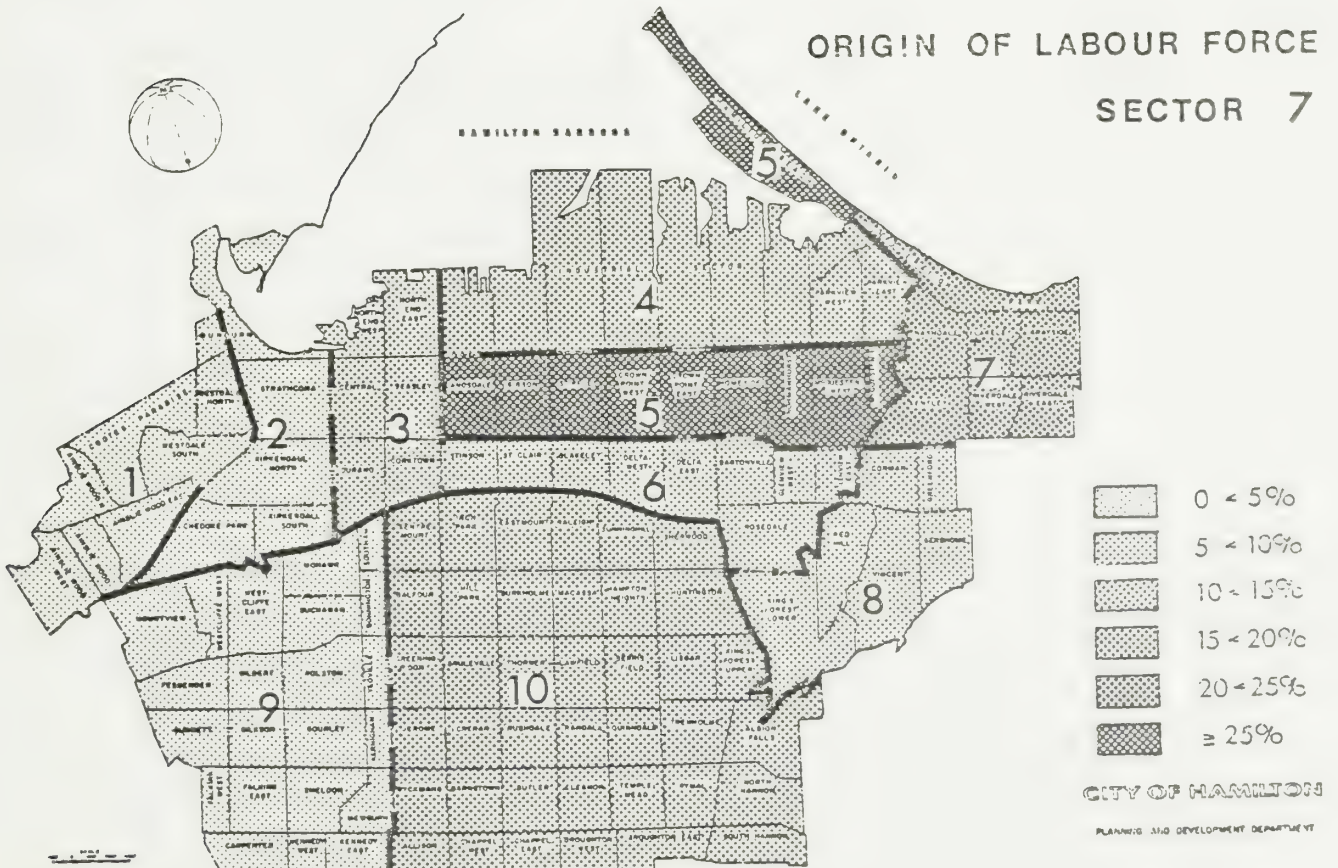
Figure 6
ORIGIN OF LABOUR FORCE

SECTOR 5



ORIGIN OF LABOUR FORCE

SECTOR 7



2.3 Industrial Areas in Hamilton

The present spatial distribution of manufacturing areas in Hamilton is characterized by relatively large agglomerations of manufacturing uses bordering the Bay Front, along the Queen Elizabeth Highway east of Red Hill Creek, and adjacent to Highway 403 in West Hamilton. Smaller industrial enclaves, intermingled with other uses, are prevalent in the peripheral areas of the C.B.D., and along railway tracks in the Lower City. The East Mountain Industrial Park is the city's most recent acquisition for industrial purposes. These principle manufacturing areas are outlined in Figure .

Description

The Bay Front (1) bounded by the main C.N.R. line, Wellington Street and Parkdale Avenue, is the major area of manufacturing in Hamilton. In 1971 over 60% of the total manufacturing employment and more than 70% of the gross manufacturing acreage was concentrated in a 4 square mile area.

This area is served by rail and water transport and will be further enhanced by the proposed industrial road.

Certain residential enclaves are being eliminated to advance the interests (primarily warehousing) of the principle industries and the infilling of water lots in Hamilton Harbour for the purposes of manufacturing has all but ceased. As a result the private market is gradually evolving the most economical use of this area.

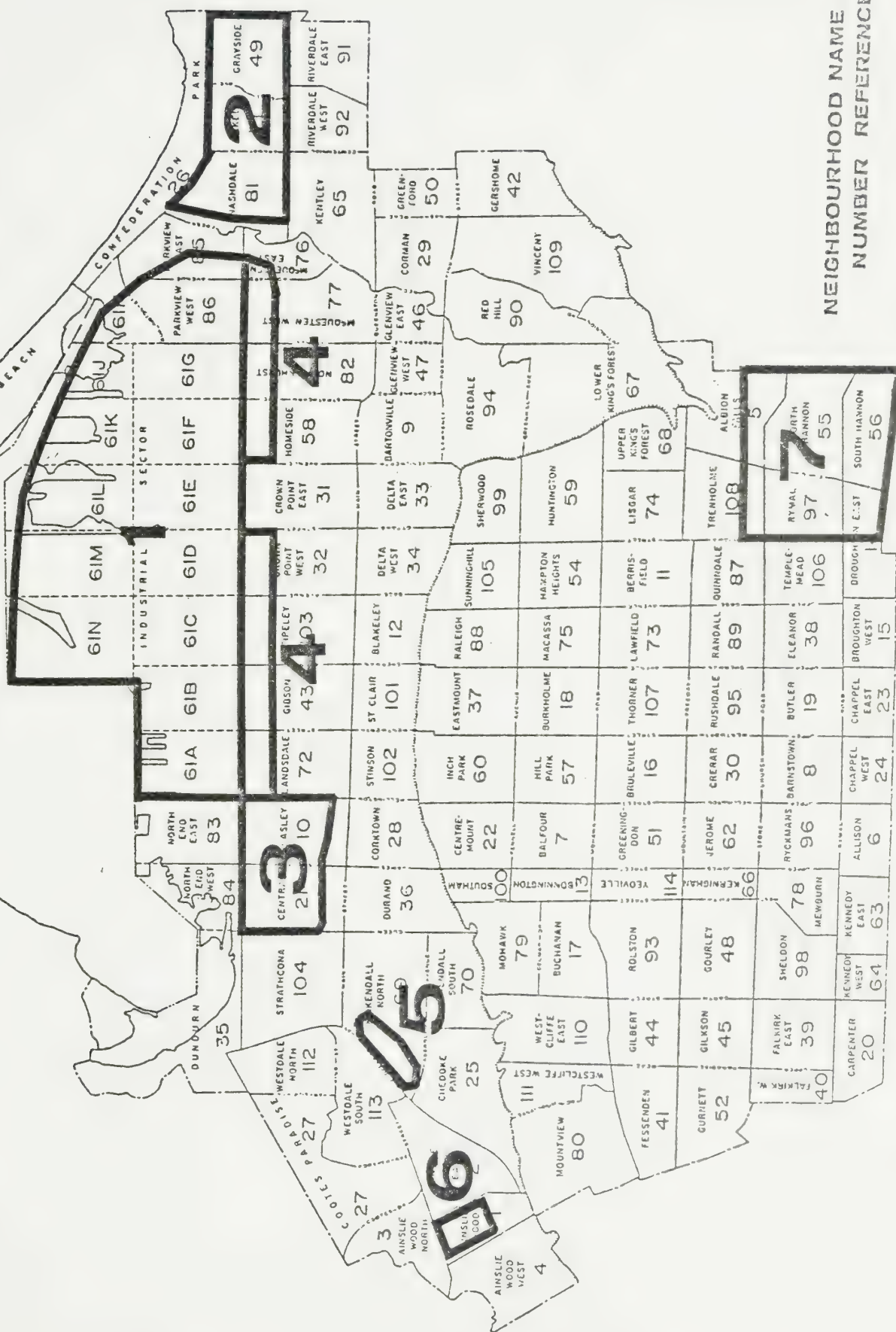
East Hamilton (2) together with the 1000 or so serviced acres of industrial land in Stoney Creek is favoured by both road and rail transportation and is experiencing significant growth.

Central City (3) - In recent years the central city industrial area has experienced an absolute decline in manufacturing employment. Urban renewal activities, lack of space for expansion, functionally and physically obsolete buildings, and the attractiveness of suburban industrial sites are some of the factors that account for the downward shift of employment.



1000 500 0 1000 2000 3000
SCALE IN FEET

Figure 7



NEIGHBOURHOOD NAME AND
NUMBER REFERENCE

Industrial areas in hamilton

Barton Street (4) - Manufacturing plants located between Barton Street and the C.N.R. tracks are generally grouped in homogeneous blocks separated by residential areas. This area is under review with indications of favouring a combination of industrial and residential development.

Chedoke (5) - This manufacturing area is strongly defined and isolated from adjacent residential uses by the railway tracks, and Highway 403. With the exception of Westinghouse and Stelco, the industrial activities are marginal and engaged in space extensive activities - building supplies, warehousing, etc. The area's strategic location with respect to transportation facilities - freeway and rail - and the central city makes it an ideal location for prestige industries.

West Hamilton (6) - This pocket of manufacturing activities consists primarily of light manufacturing establishments. Perimeter effects from the industries are generally not adverse.

East Mountain (7) - This 725 acre industrial park reflects the change in philosophy towards restricted manufacturing areas sited in proximity to an efficient road and rail system. Furthermore, by including a business zoning category, it provides an attraction to those manufacturing interests for which an adjacent retail outlet is desirable. The latter is unique to Hamilton, a prerequisite to the establishment of today's viable industrial parks, and should serve as a lure for the park's initial development.

Table 4 and Figure 9 depict the latest documented manufacturing employment by a neighbourhood basis. Manufacturing activity in Strathcona, Central, Beasley and several of the Barton Street neighbourhoods has declined since the 1971 survey according to the neighbourhood planning section. Fortunately this phenomenon has been studied in some depth by Walker and Bater of the University of Waterloo.

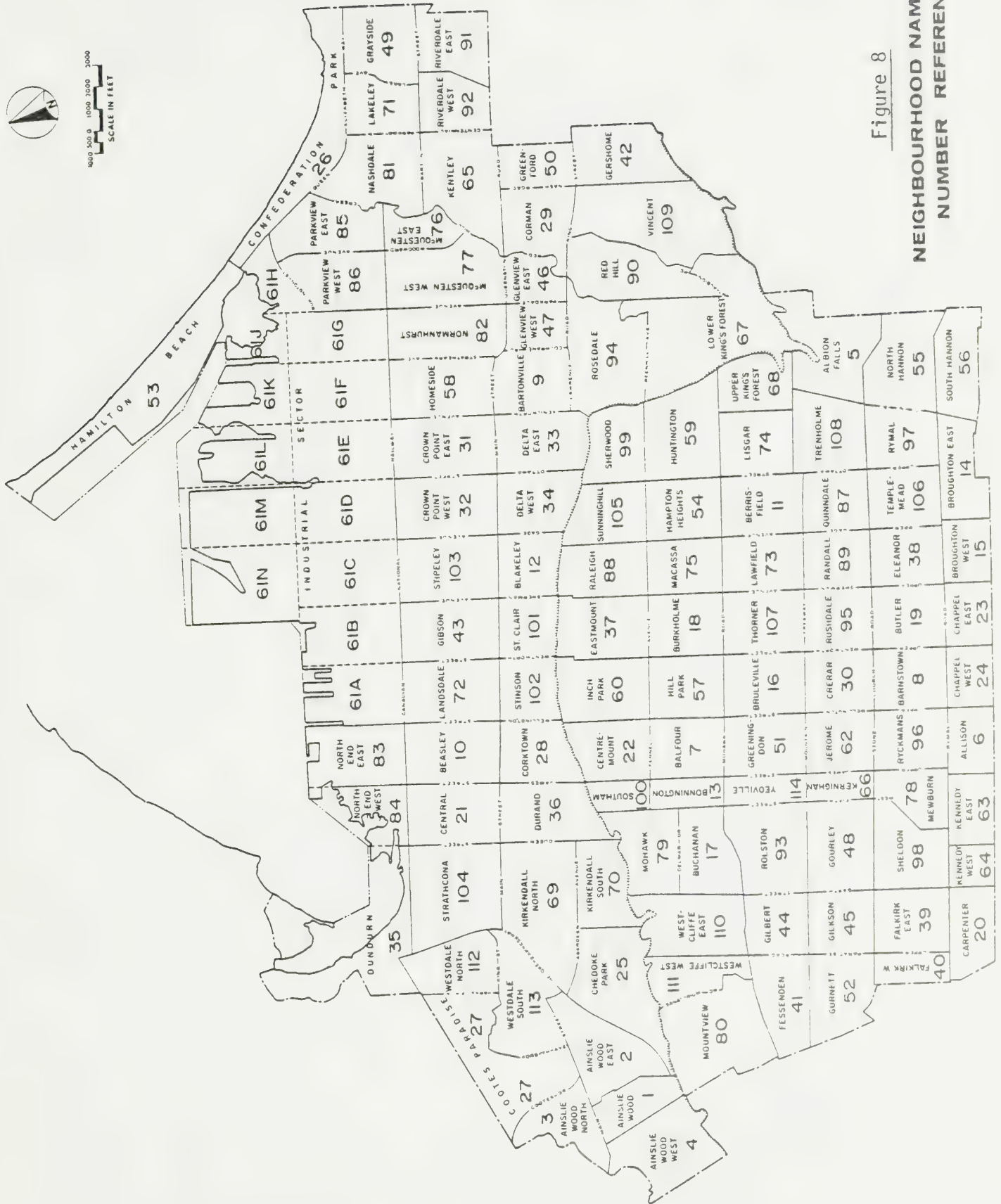


TABLE 4

MANUFACTURING EMPLOYMENT BY NEIGHBOURHOOD 1971

NEIGHBOURHOOD	MANUFAC- TURING	NEIGHBOURHOOD	MANUFAC- TURING	NEIGHBOURHOOD	MANUFAC- TURING	NEIGHBOURHOOD	MANUFAC- TURING
1 Ainslie Wood	243	33 Delta East	14	65 Kentley	0	97 Rydal	0
2 Ainslie Wood East	83	34 Delta West	32	66 Kernighan	0	98 Sheldor.	0
3 Ainslie Wood North	0	35 Durdur.	0	67 Kings Forest Lower	0	99 Sherwood	0
4 Ainslie Wood West	0	36 Durard	21	68 Kings Forest Upper	0	100 Southam.	16
5 Albion Falls	0	37 Eastmourt	16	69 Kirkendall North	2,556	101 St. Clair	122
6 Allisor.	0	38 Eleanor	0	70 Kirkendall South	4	102 Stinson	39
7 Balfour	1	39 Falkirk East	0	71 Lakeley	1,036	103 Stipeley	39
8 Barnstowr.	0	40 Falkirk West	0	72 Landsdale	337	104 Strathcona	1,597
9 Bartonville	2	41 Fessenden	0	73 Lawfield	0	105 Sunninghill	930
10 Beasley	2,037	42 Gershome	0	74 Lisgar	0	106 Templemead	2
11 Berrisfield	2	43 Gibson.	2,136	75 Macassa	0	107 T. corner	0
12 Blaxelley	490	44 Gilbert	0	76 McQuesten East	125	108 Trenholme	0
13 Bonnington	23	45 Gilkison	0	77 McQuesten West	71	109 Vincent	0
14 Broughton East	20	46 Glenview East	3	78 Mewburn	0	110 Westcliffe East	0
15 Broughton West	0	47 Glenview West	0	79 Mohawk	0	111 Westcliffe West	0
16 Bruleville	0	48 Courley	0	80 Mountview	0	112 Westdale North	29
17 Buchanan	0	49 Grayside	103	81 Nashdale	190	113 Westdale South	53
18 Burkholme	0	50 Greenford	0	82 Normanhurst	494	114 Yeoville	11
19 Butler	0	51 Greeningdon.	60	83 North End East	424		
20 Carpenter	0	52 Gurnett	0	84 North End West	31		
21 Central	1,711	53 Hamilton Beach	0	85 Parkview East	770		
22 Centremount	2	54 Hampton Heights	2	86 Parkview West	0		
23 Chapel East	0	55 Hannon North	4	87 Quindale	0		
24 Chapel West	0	56 Hannon South	54	88 Raleigh	5		
25 Chedoke Park	157	57 Hill Park	0	89 Randall	0		
26 Confederation Park	0	58 Homeside	101	90 Red Hill	0		
27 Coates Paradise	0	59 Huntington.	0	91 Riverdale East	2		
28 Corktown	426	60 Inch Park	2	92 Riverdale West	0		
29 Corman	0	61 Industrial Sector	39,806	93 Rolston	0		
30 Crerar	0	62 Jerome	1	94 Rosedale	0		
31 Crown Point East	22	63 Kennedy East	0	95 Rushdale	0		
32 Crown Point West	1,044	64 Kennedy West	0	96 Ryckmans	0		
						ALL NEIGHBOURHOODS	58,740



2.4 Availability of Serviced Industrial Land in Hamilton

To date, the only available documentation concerning industrial land use in Hamilton has been through the assessment records. These figures, while providing an overall indication of the city's industrial framework do not accurately portray the amounts of land that are actually used or are available for this purpose. It was, therefore, necessary to compare each industrial property with the most recent neighbourhood zoning. This enabled the compilation of a more realistic account of the existing land use and afforded an insight into the location and zoning of lands available for future industrial development. As well, those industrial establishments presently operating as a non-conforming use are included for the first time in a study of this nature.

The information is summarized in Table 5 by neighbourhood and for the City of Hamilton at large. As the East Mountain Industrial Park is in its infant stage, statistics related to this area are incomplete. Consequently, for the intentions of this table, it has been excluded, and will be reviewed separately.

Major findings include several interesting facts. The amount of industrially zoned land that is actually used for industrial use varies from 24% (J) to 68% (K). The figure for the entire city is 60%, leaving some 2,100 acres of industrial land in other than its designated use. Much of this acreage remains unavailable for industrial land use, as it includes utility corridors, ravines, rail yards, areas of viable housing and other unrelated uses. To say that a parcel of land is vacant does not necessarily imply that it is marketable. Corporate and individual decisions may defer immediate use of the land for potential expansion. The size and shape of the lot may render it unusable for all but a few operations, or soil structure may pose engineering restrictions.

These were certain of the considerations employed in calculating the lands available for development over the next 10 years. Availability of serviced land ranged from as much as 10% of the lands zoned "JJ" to as few as 20 marketable acres in the "K" district. The City of Hamilton registered only 105 acres, or 2.0% of the total acreage zoned, indicating the lack of suitable area for expansion below the escarpment.

The latter situation becomes crucial when it is realized that 200 industrial establishments are presently non-conforming uses. Table 5 indicates that 100 such operations have been rezoned from either "J" or "K" in their respective neighbourhood plans, posing serious restrictions for many of the firms.

East Mountain Industrial Park

The East Mountain Industrial Park (Figure 7) was approved by Council in December of 1971 in response to growing awareness that suitable lands for the establishment and expansion of industry in Hamilton were fast disappearing. It encompasses 1,200 acres in the southeasterly section of the city, and includes 725 acres of prestige industrial land. The city owns 165 acres of the latter, which, together with the Regional Municipality's 40 acres, comprises the publicly owned industrial acreage. The remaining 500 acres are privately owned and subject, as are the public lands, to the park's development controls.

Servicing for the city's first stage, (72 of its 165 acres) will be completed by September, 1976. Of this acreage, about one-half has been optioned to date (May, 1976) and it is anticipated that the second stage of this municipal development will be serviced by June, 1978. The development controls stipulate that the construction of structures related to the industry for which a lot has been acquired must commence within 6 months of the closing of the contract. Otherwise, the City or Region has the option to re-purchase the lot at the original sale price. Closure of the contract arises after servicing, zoning, and plan registration are finalized. The M11 - M14 zoning proposed for the park was recently given Ontario Municipal Board approval.

TABLE 5

INDUSTRIAL ZONING AND LAND USE BY NEIGHBOURHOOD

Neighbourhood	Zoning	Acres	Industrial Land Use	Acres	% of Zoning	Calculated Lands Available
AINSLIE WOOD	J	34.3	72	14.1(M-14)	41%	8 acres
			77	5.7(M-14)	17%	in M-14
				19.8a	58%	23%
AINSLIE WOOD EAST	J	6.2	72	5.2	84%	nil
ALBION FALLS	EAST MOUNTAIN INDUSTRIAL PARK					
BEASLEY	K	50	71	7.3	15%	
			73	2.9	6%	
			77	2	4%	
			78	2	4%	
			79	2.6	5%	
				16.8a	34%	nil
	JJ	12.5	73	1.7	14%	
			77	1.2	10%	
			79	.6	5%	.2a
				3.5a	29%	2%

NON-CONFORMING INDUSTRIAL LAND USE

Zoning	Land Use	Number of Establishments	Total Sq. Ft.	Average Establishment
I-existing	72	2	68,224	3,400
	73	3	20,125	6,700
		5	88,349 (2a)	17,700
J-past	73	25	194,700	7,800
	77	15	181,100	12,000
	79	1	2,600	2,600
		47	411,950 (9.5a)	8,800
K-past	72	6	33,550 (.8a)	5,600

Neighbourhood	Zoning	Acres	Industrial Land Use	Acres	% of Zoning	Calculated Lands Available
BLAKELEY	JJ	5.1a	72	.2	4%	
			73	.5	10%	nil
				.7	14%	
	M-13	1.4a	77	1.4	100%	nil

PHYSICAL LAND USE CLASSIFICATIONS

Industrial

Heavy Industry	71
Light Industry	72
Prestige Industry	73

Storage and Warehousing

Bulk Warehousing in Tanks and Elevators	76
Other Warehousing in Building Structures	77
Open Storage Areas other than Junk Yards, Auto Wreckers	78
Open Storage for Junk Yards and Auto Wreckers	79

NON-CONFORMING INDUSTRIAL LAND USE

<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishment</u>
J-past	72	1	56,018	56,000
	73	1	178,596	178,600
	78	1	10,073	10,100
			244,687 (5.6a)	81,600

<u>BROUGHTON EAST</u>		<u>EAST MOUNTAIN INDUSTRIAL PARK</u>				
<u>Neighbourhood</u>	<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
CENTRAL	JJ	12.1a	72	.7	6%	nil
			73	2.0	17%	
				2.7	23%	
	J	8.2	72	.7	9%	nil
			78	.3	4%	
				1.0	13%	
	K	27.0a	71	5.3	19%	nil
			72	1.1	4%	
			73	4.1	15%	
			78	.5	2%	
			79	1.8	7%	
				12.8	47%	

NON-CONFORMING INDUSTRIAL LAND USE

<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishment</u>
H-existing	73	1	11,892	11,900
I-existing	72	1	26,136	26,100
	73	3	22,552	7,500
		4	48,688 (1.1a)	12,200
J-past	71	1	6,098	6,100
	72	6	104,972	17,500
	73	6	75,091	12,500
	77	10	81,883	8,200
	78	2	6,229	3,100
		25	274,273 (6.3a)	11,000

Central (continued)

NON-CONFORMING INDUSTRIAL LAND USE

<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishment</u>
K-past	72	1	47,244	47,250
	77	4	111,971	28,000
	78	1	19,491	19,500
	79	<u>3</u>	<u>41,521</u>	<u>13,850</u>
		9	220,227 (5.1a)	24,500

<u>Neighbourhood</u>	<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
CHEDOKE PARK	K	88.4a	73	8.2	9%	nil
CONFEDERATION PARK	JJ	1.3	nil			nil
	KK	27.7	72	6.8	25%	
			73	<u>.3</u>	<u>1%</u>	nil
				7.1	26%	
CORKTOWN	JJ	12.1	73	.6	5%	
			77	<u>6.2</u>	<u>51%</u>	
				6.8	56%	nil

NON-CONFORMING INDUSTRIAL LAND USE

<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishment</u>
I-existing	72	1	2,875	2,875
	73	<u>2</u>	<u>23,430</u>	<u>11,700</u>
		3	26,305 (0.6a)	8,800
J	78	1	47,034 (1.1a)	47,000

	<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
CRERAR	JJ	5	71	4.1	81%	
			78	<u>.9</u>	<u>19%</u>	
				5.0	100%	nil

NON-CONFORMING INDUSTRIAL LAND USE

	<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishment</u>
CROWN POINT EAST	D	71	1	2,483	2,500
		73	<u>1</u>	<u>7,781</u>	<u>7,800</u>
			2	10,264 (0.2a)	5,100
	H	72	2	5,619	2,800
		73	<u>1</u>	<u>2,962</u>	<u>3,000</u>
			3	8,581 (0.2a)	2,900

	<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
CROWN POINT WEST *	K	57.3	72	19.2	34%	
			73	2.4	4%	
			77	<u>2.3</u>	4%	
				23.9	42%	nil

NON-CONFORMING INDUSTRIAL LAND USE

	<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishment</u>
	D	72	1	2,209	2,200
	H	72	5	62,702	12,500
		73	<u>1</u>	<u>3,964</u>	<u>4,000</u>
			6	68,875 (1.6a)	9,800

* Zoning previous to that of approved neighbourhood plan.

	<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
DELTA WEST	A		71	13		nil
GIBSON	JJ	10	72	1.7	17%	
			73	.2	2%	
			77	.8	8%	
			78	<u>.2</u>	<u>2%</u>	
				2.9	29%	nil
	K	38	(Westinghouse)			
			62	15	39%	
			<u>77</u>	<u>.1</u>	<u>.1%</u>	
				15.1a	39%	nil

NON-CONFORMING INDUSTRIAL LAND USE

	<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishment</u>	
	J-past	72	1	16,855	16,900	
		73	8	50,474	6,300	
		77	<u>3</u>	<u>66,588</u>	<u>22,200</u>	
		12	133,917 (3.1a)	11,200		
	K-past	72	2	15,141	7,600	
		73	3	25,371	8,500	
		77	1	6,950	7,000	
		79	<u>1</u>	<u>12,615</u>	<u>12,600</u>	
	7	60,077 (1.4a)	8,600			
	H-existing	72	1	1,786	1,800	
73		<u>2</u>	<u>3,964</u>	<u>2,000</u>		
<u>3</u>		<u>5,750</u> (0.1a)	<u>1,900</u>			
<hr/>						
GLENVIEW EAST	C	73	1	3,136	3,100	
	H	73	<u>1</u>	<u>11,369</u>	<u>11,400</u>	
			2	14,505	7,300	
<hr/>						
	<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
GRAYSIDE	JJ	58.3	73	.4	1%	
			77	1.6	3%	
			78	<u>2.9</u>	<u>5%</u>	
			4.9	9%	5a(8.6%)	
	KK	105.4		(outdated)		
			71	2.1	2%	
			72	5.1	5%	
			73	28	27%	
			77	2.4	2%	
			78	<u>1.7</u>	<u>2%</u>	
			39.3	38%	3a(2.8%)	
	V(KK&JJ)	47	73	1.5	3%	
			77	<u>11.6</u>	<u>25%</u>	
			13.1	28%		
	<hr/>					
	GREENINGDON	JJ	19	71	11	58%
73				1.1	6%	
77				<u>.8</u>	<u>4%</u>	
12.9				68%	nil	

NON-CONFORMING INDUSTRIAL LAND USE

	<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishment</u>
GREENINGDON (continued)	C	73	3	42,119 (1a)	14,000
NORTH HANNON	EAST MOUNTAIN INDUSTRIAL PARK				
SOUTH HANNON	EAST MOUNTAIN INDUSTRIAL PARK				

	<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
HOMESIDE	K	4.6	71	.9	19%	
			72	.4	9%	
			73	.1	3%	
			77	.1	2%	
			78	.4	9%	
				1.9	42%	nil

NON-CONFORMING INDUSTRIAL LAND USE

	<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishment</u>
	H	73	1	3,180 (0.1a)	3,200

	<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
INDUSTRIAL SECTOR (Neighbour- hood 61)	J	43.3	71	3.5	8%	
			72	4.8	11%	
			73	21	49%	
			77	2.3	5%	
				31.6	73%	nil
	K	3338	71	1685	50%	
			72	163	5%	
			73	386	12%	
			76	32	1%	
			77	129	4%	
			78	12	.4%	
			79	33	1%	
				2440	73%	
			28	200	6%	13 acres on market

RESIDENTIAL ENCLAVES (N-61)

<u>Zoning</u>	<u>Land Use</u>	<u>Property Area</u>	<u>% of Zoning</u>
J	02	6,838 (.2)	-
K	01	7,449 (.2)	
	02	2,794,300 (64.2)	
	03	3,920 (.1)	
	04	153,889 (3.5)	
	06	16,607 (0.4)	
	07	321,618 (7.4)	
	08	11,692 (0.3)	
	09	98,094 (2.3)	
	10	66,532 (1.5)	
	14	21,613 (0.5)	
	16	11,587 (0.3)	
		3,507,301 (80.5a)	2.4%

Property
Code

Residential Individual

Residential Accessories on a Separate Parcel	01
Single Family Detached	02
Single Family Detached Conversion	03
Semi-Detached	04
Semi-Detached Conversion	05
Duplex	06
Duplex Conversions	07
Other Plexes (Triplexes, Sixplexes, etc.)	08
Other Plexes Conversions	09
Row Houses	10
Row House Conversions	11
Other One and Two Unit High Attached (Maisonnettes, Quadrifoil, etc.)	12
Other Attached Conversions	13
Apartments Only	14
Apartments (Two or More Dwelling Units High in Mixed Use Building)	15
Apartments Conversions	16
Seasonal Dwelling Unit	17
Trailer Camp	18

<u>Neighbourhood</u>	<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
KENTLEY	JJ	6.2	78	.1	2%	4.7a(76%)

NON-CONFORMING INDUSTRIAL LAND USE

<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishment</u>
HH	73	1	29,969	30,000
KERNIGHAN V(C,AA)	77	1	13,155	13,200

<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
KIRKENDALE NORTH	K	160	71	5.2	3%
			72	42.0	26%
			73	10.8	7%
			77	11.0	7%
			78	2.0	1%
				71.0	44%
					nil

NON-CONFORMING INDUSTRIAL LAND USE

<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishment</u>	
D	73	2	27,262 (0.6a)	13,600	
H	73	2	19,999 (0.5a)	10,000	
<hr/>					
KIRKENDALE SOUTH	C	73	1	2,915 (0.7a)	2,900

<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
LAKELEY	JJ	55	72	2.8	5%
			73	4.8	9%
			77	6.2	11%
			78	2.0	4%
			79	4.2	8%
				20.0	37%
					12a(22%)
	KK	142	71	17.7	12%
			72	14.1	10%
			73	12.9	9%
			77	9.0	6%
				53.7	37%
					18a(13%)
	V(J+K)				12a

<u>Neighbourhood</u>	<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
LANDSDALE	JJ	3.3	73	1.0	30%	
			77	0.6	18%	
				1.6	48%	nil
	K	3.4	71	3.0	91%	nil

NON-CONFORMING INDUSTRIAL LAND USE

<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishment</u>
D	72	1	2,744	2,700
	73	3	25,396	8,500
		4	28,140 (0.6a)	7,000
E	72	1	27,530	27,500
	73	3	11,804	3,900
		4	39,334 (0.9a)	9,800
H	72	1	9,106	9,100
		2	26,485	13,200
		3	35,591 (0.8a)	11,900

	<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
McQUESTEN EAST	K	32.6	nil			nil
McQUESTEN WEST	J	14.9	72	0.6	4%	
			73	0.5	4%	
			77	2.2	15%	
				3.3	23%	nil
	K	47.8	71	10.2	21%	
			77	14	29%	
			78	1.8	4%	
				26.0	54%	nil
NASHDALE	JJ	40.7	72	4.1	10%	
			73	0.3	1%	
			77	15.3	38%	
			78	5.6	14%	
				25.3	63%	nil
	K	16.0	72	3.0	19%	3.5a (22%)

<u>Neighbourhood</u>	<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
	KK	162.2	71	4.9	3%	
			72	5.2	3%	
			73	.4	0.2%	
			77	33.9	21.0%	
			79	12.3	8.0%	
				56.7	35.0%	30a(18%)
NORMANHURST	K	36.8	71	12.7	35.0%	
			72	10.1	27.0%	
			73	4.5	12.0%	
			79	2.5	7.0%	
				29.8	81.0%	nil

NON-CONFORMING INDUSTRIAL LAND USE

<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishment</u>
H	73	1	3,485	3,500

<u>Neighbourhood</u>	<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
NORTH END EAST	J	168.4	73	2.5	2.0%	
			77	18.4	11.0%	
			78	8.4	5.0%	
				29.4	18.0%	nil
	K	3.4	71	2.6	76.0%	
			78	.4	12.0%	
				3.0	88.0%	nil

NON-CONFORMING INDUSTRIAL LAND USE

<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishment</u>
D	72	5	35,843 (0.8a)	7,200
	73	2	14,042 (0.3a)	7,000
		7	49,885 (1.1a)	7,100
DE 3	73	1	20,996 (0.5a)	21,000

<u>Neighbourhood</u>	<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
NORTH END WEST	J	0.8	78	0.3	37%	nil
	K	1.8	CNR			nil

NON-CONFORMING INDUSTRIAL LAND USE

<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishments</u>
D	72	1	7,100	7,100

<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
PARKVIEW EAST	J	208	72	1.7	0.8%
			73	.5	.2%
			77	8.0	4.0%
			78	1.2	0.6%
			11.4	5.6%	nil
PARKVIEW WEST	J	107	71	1.2	1.1%
			72	13.8	12.8%
			73	5.6	5.2%
			77	10.4	9.7%
			78	0.7	.6%
			31.7	29.6%	
	V		72	2.0	
			73	0.7	
			2.7		

NON-CONFORMING INDUSTRIAL LAND USE

<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishments</u>
C	73	1	2,962	3,000

QUINN- DALE	H	73	1	4,966	5,000
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ROSEDALE	A	72	1	130,000	130,000
	G	71	2	12,894	6,500

	<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishment</u>	
RYCKMANS	AA/S.309	73	1	109,546 (2.5a)	109,500	
	V(C,AA)	77	1	84,114 (1.9a)	84,100	
RYMAL	EAST MOUNTAIN INDUSTRIAL PARK					
SOUTHAM	H	73	1	4,172	4,200	
	<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
ST. CLAIR	J		TH&B	10.9	59%	nil
			(NOW UNDER NIAGARA ESCARPMENT COMMISSION CONTROL)			
	JJ	2.2	73	1.0	5.3%	1.2

NON-CONFORMING INDUSTRIAL LAND USE

<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishment</u>
H	73	1	12,890	12,900

<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>	
STINSON	JJ	0.5	77	0.5	100%	nil
	M-13	3.0	89	3.0	100%	nil

NON-CONFORMING INDUSTRIAL LAND USE

	<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishment</u>
	D	73	1	1,330	1,300
	E	72	1	3,223	3,200
		73	1	6,403	6,400
				9,626 (0.2a)	4,800

<u>Neighbourhood</u>	<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
STIPELEY	K	34	71	2.1	6%	
			72	14.1	41%	
			73	1.1	3%	
			77	5.2	15%	
				22.5a	65%	nil

NON-CONFORMING INDUSTRIAL LAND USE

<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishment</u>
D	72	2	4,904	2,500
	73	<u>1</u>	<u>2,483</u>	<u>2,500</u>
		3	7,387 (0.2a)	2,500
H	72	1	55,080	55,100
	73	<u>2</u>	<u>6,589</u>	<u>3,300</u>
		3	61,669 (1.4a)	20,500

<u>Neighbourhood</u>	<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
STRATHCONA	J	2	72	0.3	15%	
			73	0.1	5%	
				0.4	20%	nil
	K	40	71	8.0	20%	
			72	5.7	14%	
				13.7	34%	nil

NON-CONFORMING INDUSTRIAL LAND USE

<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishment</u>
D	72	1	7,231	7,200
E	72	1	93,984	9,400
H	72	1	37,941	38,000
	73	<u>6</u>	<u>27,135</u>	<u>4,500</u>
		7	65,076 (1.5a)	9,300
J-past	73	3	23,040	7,700

TRENHOLME

EAST MOUNTAIN INDUSTRIAL PARK

<u>Neighbourhood</u>	<u>Zoning</u>	<u>Acres</u>	<u>Industrial Land Use</u>	<u>Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>
Westdale North	J	73.7	73	0.4	1%	nil

NON-CONFORMING INDUSTRIAL LAND USE

	<u>Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average Establishment</u>
Westdale South	E	72	1	11,249	11,200
	H	73	1	9,975	10,000
Yeoville	HH	73	3	29,061	9,700

TABLE 6

INDUSTRIAL ZONING AND LAND USE FOR THE CITY OF HAMILTON *SUMMARY

<u>Zoning</u>	<u>Total Acres</u>	<u>Industrial Land Use</u>	<u>Total Acres</u>	<u>% of Zoning</u>	<u>Calculated Lands Available</u>	<u>1.</u>
J	436	71	4.7	1%		
		72	41.2	9%		
		73	27.7	6%		
		77	28.6	7%		
		78	2.5	1%		
			104.7	24%	8a(2%)	
JJ	244	71	15.1	6%		
		72	9.5	4%		
		73	13.6	6%		
		77	34.1	14%		
		78	11.7	5%		
		79	4.8	2%		
			89.0	36%	25a (10%)	
K	3975	62	15.0	-		
		71	1740.0	44%		
		72	259.0	7%		
		73	420.0	11%		
		76	32.0	1%		
		77	164.0	4%		
		78	19.0	-		
		79	40.0	1%		
			2689.0	68%	20a	
KK	437	71	24.7	6%		
		72	31.2	7%		
		73	41.6	10%		
		77	45.3	11%		
		78	1.7	-		
		79	12.3	3%		
			156.8	36%	40a (9%)	
V	62	72	2.0	3%		
		73	2.2	4%		
		77	11.6	19%		
			15.8	25%	12a (19%)	
	5,155		3055.0		105a (2.0%)	

Of the 5155 acres of land zoned for industry, 3055 acres or 59% is actually used for the industrial purposes.

* Excluding the East Mountain Industrial Park.

1. Lands believed to be realistically marketable within the next 10 years - see 2.4

TABLE 7

SUMMARYNON-CONFORMING INDUSTRIAL LAND USE FOR THE CITY OF HAMILTON*

<u>Industrial Division</u>	<u>Zoning</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average</u>
71 Heavy Industry	J-Rezoned	1	6,098	6,100
	D	1	2,483	2,500
	G	2	12,894	6,400
		<u>4</u>	21,475 (0.5a)	5,400
72 Light Industry	J-Rezoned	8	177,845	22,200
	K-Rezoned	9	95,935	10,700
	D	11	60,031	5,500
	H	11	172,234	15,700
	I	4	97,235	24,300
	E	4	135,986	34,000
	A	1	130,000	130,000
		<u>48</u>	869,266 (20a)	18,100
73 Prestige Industry	J-Rezoned	43	521,901	12,100
	K-Rezoned	3	25,371	8,500
	D	11	99,290	9,000
	H	28	212,057	7,600
	I	8	66,107	8,300
	E	4	18,207	4,600
	C	6	51,132	8,500
	A	1	109,546	109,500
		<u>104</u>	1,103,611 (25.3a)	10,600
77 Warehousing in Building Structures	J-Rezoned	28	329,571	11,800
	K-Rezoned	5	118,921	23,800
	V	2	97,269	48,600
		<u>35</u>	545,761 (12.5a)	15,600
78 Open Storage Areas other than junk yards, auto wrecks	J-Rezoned	4	63,336	15,800
	K-Rezoned	1	19,491	19,500
		<u>5</u>	82,827 (1.9a)	16,600
All Industrial Divisions		<u>196</u>	<u>2,622,940 (60.0a)</u>	<u>13,400</u>

* Non-conforming industrial land uses are those which are designated other than Industrial in the City's Official Plan. In most cases they are included under a modified zoning which although limiting the number of permitted uses, does allow for the existing use.

TABLE 8
TOTAL NON-CONFORMING INDUSTRIAL ESTABLISHMENTS
RESULTING FROM NEIGHBOURHOOD REZONINGS

<u>Past Zoning</u>	<u>Land Use</u>	<u>Number of Establishments</u>	<u>Total Square Ft.</u>	<u>Average</u>
J	71	1	6,098	6,100
	72	8	177,845	22,200
	73	43	521,901	12,100
	77	28	329,571	11,800
	78	4	63,336	15,800
		<u>84</u>	<u>1,098,751 (25.2a)</u>	<u>13,100</u>
K	72	9	95,935	10,700
	73	3	25,371	8,500
	77	5	118,921	23,800
	78	<u>1</u>	<u>19,491</u>	<u>19,500</u>
		18	259,718 (6.0a)	14,400
Total Rezonings		<u>102</u>	<u>1,358,469 (31.2a)</u>	<u>13,300</u>

2.5 INDUSTRIAL PLANNING AND LAND DEVELOPMENT IN HAMILTON

As previously mentioned, much of Hamilton's industrial planning and development is a product of historical forces which operated decades ago. Until the Official Plan for the City was approved in 1951, the Industrial Commissioner advised Council as to the interests of industry. The 1951 plan incorporated certain of the proposals in Faludi's 1947 Master plan in designating additional lands for industries requiring access to harbour, rail and highway facilities, as well as land for particularly obnoxious operations.

For the most part these designations encompassed the remaining vacant Bayfront lands, Beasley neighbourhood and the residential enclaves north of Barton Street. The Ainslie Wood and Kirkendale industrial areas were initiated to better accomodate those plants dependent on rail. East Hamilton became popular as the Bay front lands became too congested or costly for all but the largest firms, and smaller, more specialized industries became oriented to the highway transport associated with the Queen Elizabeth Way.

As this demand for small affordable parcels of accessible land increased, it was apparent that the city's competitive position in this respect was declining. This prompted the development of some 725 acres of restricted industrial land in what is now the East Mountain Industrial Park (Figure 7). The area is presently served by a CNR line, and it is anticipated that it will be bordered on the north by the proposed Mountain Freeway and on the east by a major North-South arterial road.

PROBLEM AREAS

The elimination of the residential enclaves north of Barton Street for industrial use was first proposed by E. G. Faludi in 1947. Amendment No. 260 to the Official Plan of the City of Hamilton re-affirmed the merit of this proposal in 1969 and established a priority system for their aquisition.

Thirty years since the initial recommendation, one finds little appreciable change in the situation, save the paradox that finance has been made available for home improvements in the area through the Ontario Home Rehabilitation Program (OHRP), which is administered by the City of Hamilton.

There is little evidence to suggest that the priority system for acquisition proposed in 1969 has been implemented. One reason for this lull stems from the fact that the City (now Regional) policy for purchasing residential properties for industrial seldom includes expropriation. Consequently, residential lots are acquired only when their owners find a suitably priced alternative, and the Region actively pursues the sale at a price at market value.

Many residents are unable to readily procure comparable accommodation within the city. Those that do vacate the neighbourhood often sell to lower income families. The Region's recent decision to set aside \$1 million annually for the next five years in a revolving fund to purchase land for industrial parks suggests and understandably so, that the Region's priority lies with assembling the suburban lands most in demand at pre-speculative costs. It is also the policy of Council, that money used to finance industrial land acquisition be recovered, through the sale of the land at a reasonable cost.

Land assembled from residential properties with lots averaging 25' x 100' amounts to some \$300,000. per acre. Economics alone have dictated that this limited acreage be abdicated in favour of the relatively inexpensive land on the city's rural hinterland. Land that can be serviced and more readily marketed to the single floor operations that so characterizes much of today's industrial expansion.

A market for industrial lands converted from residential enclaves exists, even at such high costs. However, those few companies with sufficient need and resources to purchase them have demonstrated that they are willing to do so only in areas near or adjacent to their main facility, and then, only if the lands are available in quantities suitable for their intended use, often warehousing.

The case in point is perhaps best illustrated by the successful conversion of the residential enclave bounded by Ottawa Street, Beach Road and the CNR spur line to the north. Dominion Foundaries purchased this area primarily for warehousing purposes. This area was transformed prior to industry's mass flight to the suburbs, at a time when prices and priorities enabled a more

With the current situation, properties are purchased throughout the enclaves and made available in such lot sizes, shapes and locations as to render the land unusable to those industries capable of meeting the price of assemblage. The net result has jeopardized the acquisition program to the point where it is now far more advantageous to locate a shipping-warehousing facility in Burlington at \$30,000 - \$40,000 per acre (Stelco's 114,000 sq. ft. fastener products warehouse) or Stoney Creek at \$25,000 - \$45,000 per acre, where immediate access to a multi-lane arterial highway is ensured.

The economic factors from which this dilemma has arisen have been accentuated over the last 30 years and will continue in this direction as the quality of the housing stock becomes further degraded and lands are amassed as near as Ancaster for as little as \$15,000 per acre.

Simply stated, these lands must be:

- 1) Made available to industry in such quantities as are needed, for their intended purpose;
- 2) At a cost that recognizes certain advantages of an inner city location yet is reasonably competitive.

The means by which this can be accomplished remains to some degree politically unpalatable in the short term.

Assembling lands in an usable fashion entails developing either a program that has the financial backing to purchase residential lots in succession at a price slightly above market value or employs some form of phased expropriation. To be successful and democratic (although some would argue the latter point), both programs should contain provision for assisting the people displaced in their quest for another home unit suited to their demands and finances, perhaps through such an agency as the Hamilton Housing Authority. It would indeed further the long term interests of housing, industry, employment and assessment in the City of Hamilton if such an innovative program could be initiated. For, as aptly illustrated by the developments of the last thirty years, traditional approaches and policies have served only to accentuate the problem.

A cost-benefit study is recommended to determine the long term complications of subsidizing these lands to reflect a more realistic market value. The City stands to profit from the multiplier effect associated with increased manufacturing and employment and may well find itself with a better assessment alternative than providing municipal services to residential areas with insufficient support populations.

The rate of decline for the existing housing stock is such that non-action may well result in living conditions previously uncharacteristic of this city. At the same time, the lands which one must remember have been designated industrial since 1951, become increasingly uneconomic to the industries (and jobs) being forced to locate elsewhere within the region.

ZONING

In light of our present knowledge of the characteristics and extent of various land uses, and viewing zoning as a means of segregating adverse and mutually incompatible uses rather than segregating progressively less intensive or more restrictive uses, zoning should be able to contribute much more than has been the case to the stability of land values.

Zoning was originally conceived to prevent the intrusion of objectionable uses, such as commercial and industrial into residential areas. With relatively few exceptions, however, there has been a failure to recognize the undesirable intrusion of residential development into business and industrial districts. There has been the tendency, encouraged by the "progressively less restrictive" theory, to use the industrial district as a residue or catch all.

What was often forgotten in this reasoning is the fact that in most urban areas, industry is the mainstay that creates the need for residence and business. One of the major factors contributing to the decentralization of industry to areas outside of the city limits has been its inability to continue to obtain sites free of existing development.

The theory that residential uses can be allowed to occupy potential industrial areas until such time as is needed, and that they will then be acquired by a public or private source for industry has proven largely invalid for the following reasons:

- 1) The costs of acquiring and clearing such properties is prohibitive.
- 2) A pattern of utilities and streets has been established which is seldom suitable to industrial uses, although this can be largely overcome with assembly.
- 3) Greater difficulties are encountered in land acquisition because of the multiplicity of ownerships and vested interests in homes.
- 4) Residential uses in industrial areas are the first to become blighted.

The net result of permitting residential development to locate in an industrial district is to set the stage for a more accentuated condition than would occur without zoning.

The reasonableness of excluding more restricted uses from industrial districts is not difficult to establish. The amount of land designated for industrial use should reflect the same assumptions as that for a residential or commercial district - existing use, plus estimated future demand. The validity of zoning for industry can then be assumed as being on par with that of other uses.

Industrial zoning has often been inadequate or improperly located. This, together with the intrusion of other, primarily residential uses and public resistance against further increases, has contributed to the decentralization of industry.

INDUSTRIAL ENCLAVES

The Neighbourhood Planning Program in reflecting the interests of primarily residential development has failed in some cases to maintain an environment that is conducive to those industries whose existence is dependent on a location adjacent to either the Central area or peripheral to the Bay Front.

The economic advantages for certain industrial firms locating within the city cover an array of factors. They may be oriented to a market characteristic of an established area, one that is dependent on the services it can receive from the multiplicity of specialized linkage industries. Other important factors may be the amount of capital investment the firm has made in its plant which makes it too expensive to move, the range of cheap rental space available, or access to the resident labour force.

If we are to assume that there is value in a diversity of socio-economic groups being able to use the city as a place of residence and employment, then it is essential to provide as wide a range of jobs as is possible.

This is of special significance to the areas being affected by the neighbourhood plans, in that it is often these firms that rely heavily on the local ethnic community for a convenient workforce. This development was recently highlighted by a follow-up study of manufacturing in the Beasley Neighbourhood by Bates and Walker of the University of Waterloo. Their findings indicate a loss of some 1000 manufacturing jobs in the neighbourhood due to the most part, to firms moving from the area. This is not to imply that neighbourhood rezonings are totally responsible for this development. Many, if not the majority of these positions, were lost as a result of deteriorating market conditions. Certain of the older industries have become less competitive and have been forced to consolidate their efforts through amalgamation and relocation. Nonetheless, to prevent the permanent loss of employment arising from neighbourhood rezonings, provision must be made for alternate locations in proximity to the original site.

As well, as outlined in the Industrial Linkage Study (1971) by the same authors, local initiative is an important growth generating force in the industrial economy of Hamilton. The Linkage Study notes that:

" In 1969, there were sixty-five locally-owned plants which had commenced operations during the 1960's and, of these, 46 (71%) were operated by persons with industrial experience in the Hamilton area . . . part of the process whereby new firms are generated out of the existing accumulation of technical and entrepreneurial skills."

It is thus essential to maintain an industrial climate suited to the continuance of this phenomenon if growth of this nature is desirable.

This potential loss is of greater concern when one examines the number of industrial establishments that operate as a non-conforming use under present municipal zoning. Tables 7 and 8 denote a total of 196 non-confirming industrial establishments in the City of Hamilton as compiled from the 1974 assessment records, and the City's zoning by-laws.

Of note, some 102 industrial establishments previously zoned either J (84) or K (18) have been rezoned. In most cases they are included under a modified zoning which, although limiting the number of permitted uses, does make provision for the existing use. This figure represents only those neighbourhood plans approved by Council to April of 1976, and will rise as the Neighbourhood Planning Program continues.

Much has been accomplished by the Neighbourhood program in rezoning many of the obviously incompatible industrial land uses that are a product of historical forces dating to the early years of this century. However, the concept of designating land use in a neighbourhood context cannot be expected to provide comprehensive guidelines for the city at large.

The private market follows the path of least resistance. For many years Hamilton's locational advantages provided the manufacturing sector with the prerequisites for the establishment and expansion of an array of industrial operations. As the city matured and the economics of manufacturing evolved varying locational requirements, this environment became steadily more restrictive. The shallow inlets of Hamilton Harbour that required a minimum of fill for their conversion to inexpensive industrial land gave way to costly reclamation projects as the Bayfront industrial sector displaced one-third of the original harbour. Limited available acreage resulted in land costs that proved to be too demanding for the single floor operations of present day plants. The need for immediate access to highway transportation accredited the suburbs as did the fact that an increasing portion of the necessary labour force was in close proximity.

As this occurred there is little evidence to suggest that counter-measures were taken to avert the exodus of many Hamilton based firms to locations outside of the city limits. The Towns of Burlington and Stoney Creek benefited considerably from this development. Council's approval of the East Mountain Industrial Park in December of 1971 ensured the presence of a similar alternative in the city's remaining undeveloped area not already committed for residential development.

The Bayfront

The relative decrease in the growth of manufacturing on the waterfront is the product of several factors:

- i) The waterfront is undergoing a natural succession as the private market runs its course. That is to say that only uses which exhibit an operational need for a harbour location are finding it economical to remain or expand production at their existing site. This has already resulted in the relocation of several industries including Texaco, Ontario Hydro and Canadian Industries Limited. The latter vacancy

furthered the evolution of perhaps type of industry most dependent on access to Hamilton Harbour when Dominion Foundries expanded onto the site.

ii) The provision of reclaimed lands has not significantly affected this development as the resultant costs have been equally prohibitive to all but those immediately dependent on proximity to the harbour. Others, attracted by the reduced overhead afforded by land with a cheaper tax base, better rail and road facilities and the basic industrial services now provided elsewhere in the region are shifting their location. Land costs along the waterfront can be as high as \$500,000. per acre, while inland costs such as those encountered in the East Mountain Industrial park may be as low as \$32,500. - (1976) per acre for serviced land.

iii) Public pressure and the perception that the waterfront should be used for public or recreational purposes have prompted planners and politicians to encourage the use of waterfront land for other than industrial purposes.

There are presently indications that these costs and constraints have precluded any further extensive areal expansion of the City's two major steel companies or their present sites. Both Dominion Foundries and the Steel Company of Canada have purchased large acreages on Lake Erie and while plans for the Dofasco complex at Port Burwell are at an early stage, the plans for Stelco's Nanticoke site are well advanced and company officials anticipate that the first steel will be produced at Nanticoke sometime in the spring of 1978.

This is not to suggest that the manufacturing interests of Hamilton will have less than a major economic influence, or cease expansion. Stelco foresees a 10% increase in production at the Hamilton (Hilton Works) site while Dofasco envisages doubling its output on lands currently owned by the company.

Increases in production and hence the labour force will evolve as a result of greater utilization of the existing land area rather than the past policy of increasing industrial acreage by reclamation.

The acreage available for industrial and restricted industrial development will increase; however, as those residential enclaves which lack sufficient amenities to warrant their continuation in industrial areas are phased out. These additional lands should help to accommodate the twofold increase in the demand for warehousing that has been forecasted by Hedlin, Menzies and Associates in their Economic, Industrial and Demographic Research Report.

GENERAL

Although slightly outdated, the 1969 Manufacturing Survey makes reference to several factors considered to significantly detract from a plant location in Hamilton. (Table 9)

TABLE 9
Disadvantages of a Hamilton Location

	<u>Number of Plants</u> *	<u>Percent</u>
Taxes	6	11
Labour Costs	26	46
Distance from markets	8	14
No Room for Expansion	8	14
Transportation Facilities	8	14
Pollution, Noxious Effects	6	11
Dominance of Steel Industry	11	20
Pressure of Organized Labour	11	20

* 58 plants responded

Lack of space for major expansion has taken its toll in terms of both assessment and job opportunities for the city. The potential relocation of Slater Steel and the loss of the John Deere Company to areas outside of Hamilton will result in job losses of 1,500 and 400 respectively.

Nonetheless many industries continue to derive advantages from their location in Hamilton. Table 10 lists the positive aspects accredited to such sites. Note again that the linkages associated with an agglomeration economy is a foremost consideration.

Table 10

Advantages of a Hamilton Location

	<u>Number of Plants *</u>	<u>Percent</u>
Proximity to markets	39	71
Proximity to materials	10	18
Transportation facilities	13	24
Labour - Productivity, Skills, Supply	14	25
Established here, services and Product known here	6	11

The Regional Business Survey of 1975 has yet to update the response of industrialists regarding their attitude to locational factors. When completed the report should provide an interesting comparison.

2.6 AVAILABILITY OF INDUSTRIAL LAND SURROUNDING HAMILTON

Table II illustrates the lands designated and occupied for industrial use in the 1975 Official Plans of the area municipalities comprising the Hamilton-Wentworth Region. This information is provided for comparative purposes only. The Regional Official Plan should be consulted for an accurate insight into industrially designated lands within the Regional-Municipality of Hamilton-Wentworth. Insofar as the availability of individual sites is concerned, The Business Development Division should be approached for details:

The Golden Horseshoe

The western end of Lake Ontario or the Golden Horseshoe as it is sometimes called, has long been part of an extensive manufacturing area running from Windsor to Montreal. When viewed in terms of this overall complex this area exhibits a relatively homogeneous locational base. It is, therefore, essential to examine the distribution and composition of the industrial lands in which you are in direct competition to ascertain a realistic framework within which to analyze future demand.

Table 12 and Figure 10 serves as a comparison of the acreages and land values in centres throughout the area under discussion. It can be noted that Hamilton lists just 14% of its designated industrial lands as being available for that purpose as opposed to the much higher percentages associated with those municipalities experiencing rapid growth. This is understandable as the latter centres have only recently evolved as a competitive alternative to industry and have significantly larger areas of undeveloped land to utilize.

TABLE 11

LANDS DESIGNATED AND OCCUPIED FOR INDUSTRIAL USE IN THE REGIONAL MUNICIPALITY
OF HAMILTON-WENTWORTH

<u>Municipality</u>	<u>Designation</u>		<u>Acreage Occupied</u>	
	<u>Industrial</u>	<u>Rural Industrial</u>	<u>Industrial</u>	<u>Rural Industrial</u>
HAMILTON	4643 (83%)	-	3312 (86%)	-
EASTER	-	55 (4%)	105 (3%)	363 (20%)
ANDAS	498 (9%)	-	81 (2%)	-
ONEY CREEK	473 (8%)	995 (73%)	310 (8%)	307 (17%)
AMBOROUGH	-	265 (19%)	-	1087 (60%)
AMBROOK	-	53 (4%)	25 (1%)	59 (3%)
REGION	5614	1368	3833	1816

. Much of the rural industrial land is used for quarrying.

Source: Growth and Development Substudy
Regional Planning Department.

TABLE 12

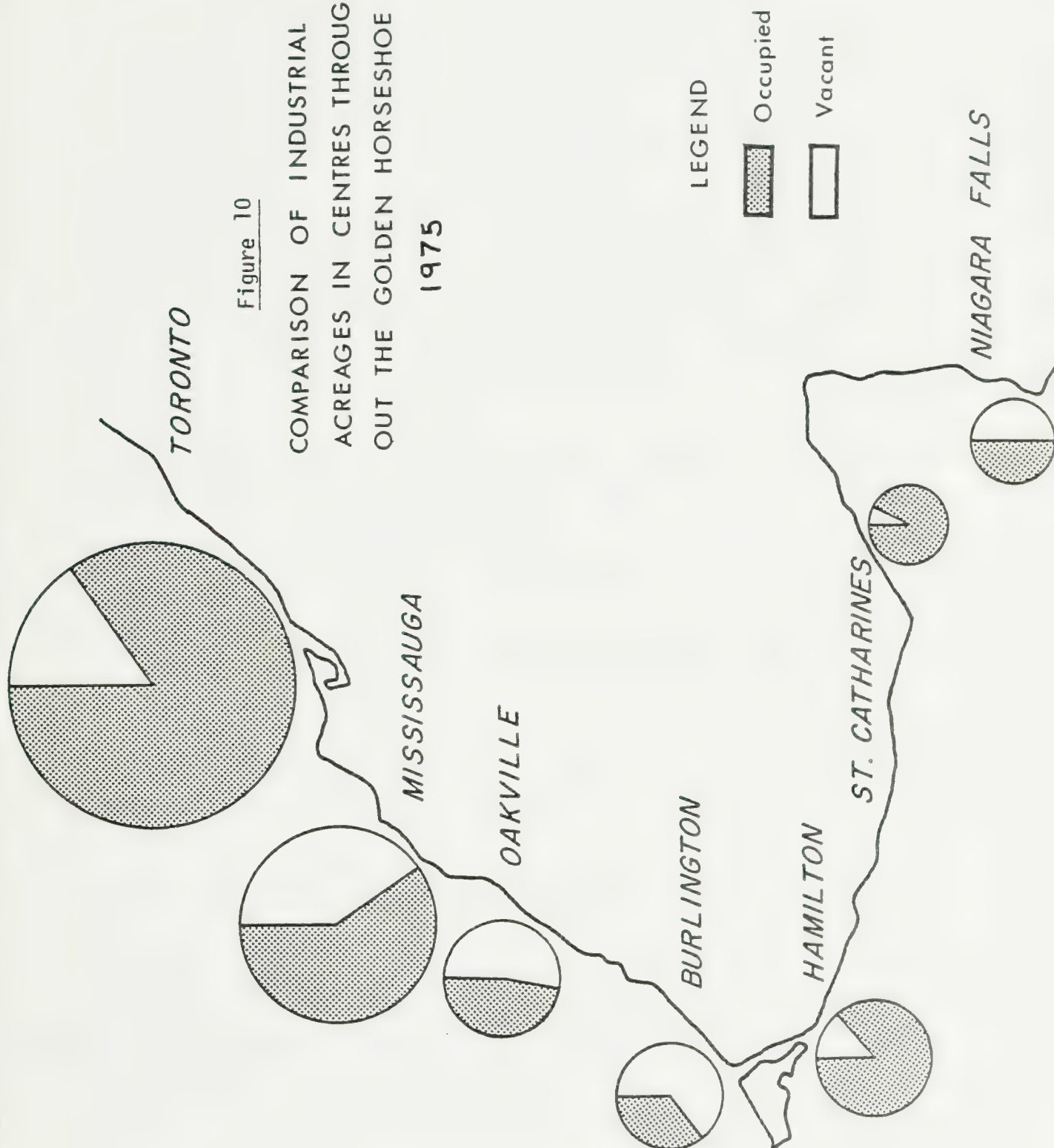
COMPARISON OF INDUSTRIAL ACREAGES AND LAND VALUES IN CENTRES THROUGHOUT
THE GOLDEN HORSESHOE AREA - 1975

<u>Municipality</u>	<u>Total Zoned 1</u>	<u>Total Occupied</u>	<u>Vacant Acreage</u>	<u>Approximate Cost Per Acre</u>
Metropolitan Toronto (1971)	26,000 (Gross Acreage)	11,500 (2,000 non-industrial use)	10,500 (4,000 net 1975 acreage)	\$60,000 - \$120,000 within Metro and \$20,000 outside of Metro Area)
<u>Remarks:</u> On the average, Metropolitan Toronto developed some 400 acres/ year from 1958-1971. The figure for Greater Metro (Metro, Peel, York, and Durham) is more than double that of the former area.				
Mississauga	11,050 <u>3,980</u> - designated 15,030	5,000	6,050 - zoned <u>3,980</u> - designated 10,030	\$65,000 - \$100,000
Oakville	5,335	2,500	2,835	\$45,000 - \$55,000
Burlington (1975)	4,800	1,670	3,130	\$30,000 - \$40,000
Hamilton	5,895	3,055	810	\$32,500 - \$125,000
Kitchener	1,250 - urban <u>1,500</u> - industrial 2,750 parks	NA	NA	\$25,000 - City \$45,000 - \$60,000 private
<u>Remarks:</u> The City of Kitchener is presently in a position to provide 110 acres within twelve months, and is endeavouring to acquire and ultimately service an additional 500 acres.				
St Catharines	1,675	1,300	75 - Municipal 50 - Private <hr/> 125 - On Market 250 - Potential <hr/> 375	\$16,000 \$30,000 - \$50,000
Niagara Falls	2,000	-	1,000 (700 Immediately)	\$12,000

Source: Local Planning Division, Regional Municipality of Hamilton-Wentworth.

Figure 10

COMPARISON OF INDUSTRIAL
ACREAGES IN CENTRES THROUGH-
OUT THE GOLDEN HORSESHOE
1975



Chapter 3

Future Economic Prospects for the City of Hamilton

3.1 The Nature of Employment Projections

A projection is an estimate of the future based on certain assumptions. Projections indicate what the future may be; they are not absolute predictions. The accuracy of any projection is dependent upon the assumption on which it is based. Past trends often afford a valuable insight into the way the municipal economy reacts under given conditions.

Such conditions, however, are never entirely similar. The land use characteristics of the city are in a constant state of change, and public policy can establish or reverse any trend. Consequently, official plans concerning as changeful an area as industrial land use and employment should be reviewed on a regular basis.

3.2 The Emerging Post - Industrial Society

The projections made for employment and land demand in the City of Hamilton extend to the year 1986. During this time, indications of a post-industrial society are expected to become more apparent.

The post-industrial society, as conceived by Kahn and others, will be characterized by a high per capita income; a high proportion of employment in the service sector, especially quaternary activities (services for their own sake, such as recreation, education, the arts, information services, and certain government services); and an increase in time available for certain leisure activities. Although manufacturing will remain a mainstay of the Hamilton economy, it will account for an increasingly smaller percent of total employment than it has in the past.

In terms of employment, the post-industrial society which is gradually evolving will be dominated by service related employment. A nominal decline in average hours of work per week and increasing leisure time may also be expected.

Many forecasters anticipate that the shift to a service economy will continue to the point where as little as 10% of the national labour force will be employed in the manufacturing sector, vs. approximately 19% in 1975.

It is the opinion of this Department that this transformation is nearing completion and should experience a slowing trend by the year 1985. As evidenced by the recession of 1974 - 1975, during strained economic times the existing services are found to adequately benefit the community without the expansion characteristic of preceding years. They are the first to bear the frugality of the consumer.

Scarcity of resources is viewed as a relatively recent phenomenon. This scarcity is reflected in a new set of "costs" not known to previous generations, and will be viewed not in physical terms as something to be overcome by production, but in economic terms as measured by rising costs. These costs are evidenced by a less ambitious life style. One need only examine multiple dwelling housing starts as opposed to the single family counterpart to realize that this lower expectations philosophy has established a foundation for the 80's.

As well, the built-in obsolescence of many of today's products will ensure a more constant demand than has been the case in the past.

Hamilton in relation to the Economy of Canada, Ontario and the Region

"Growth of output hinges essentially on increases in manpower, capital stock, and productivity. An examination of the probable evolution of these three factors during the next decade reveals that it will be difficult, if not impossible, to maintain the strong economic growth experienced in Canada in the 1960's."

- Economic Council of Canada, 1975.

The marked decline in the birth rates of the early 1960's will be reflected in a much slower growth in the supply of labour in the years to 1985. The following Economic Council forecasts illustrate the rapid decline in the number of persons entering the labour force, together with the changes envisaged in other age groups during this period.

Average Annual Percentage Change

	<u>1966-73</u>	<u>1975-80</u>	<u>1980-85</u>
Population	1.4	1.2	1.1
Working-age population	2.4	2.0	1.3
14-19	2.6	-0.1	-3.5
20-24	4.2	2.4	0.2
25-34	3.7	4.0	2.7
35-44	-0.2	2.4	4.4
45-54	1.9	0.3	0.3
55-64	2.8	2.3	1.7
65+	2.6	2.4	2.0

The reduction in the number of persons entering the work force can only be offset by a rapid rise in participation rates or an unusually high level of immigration. Both are unlikely to materialize by 1986.

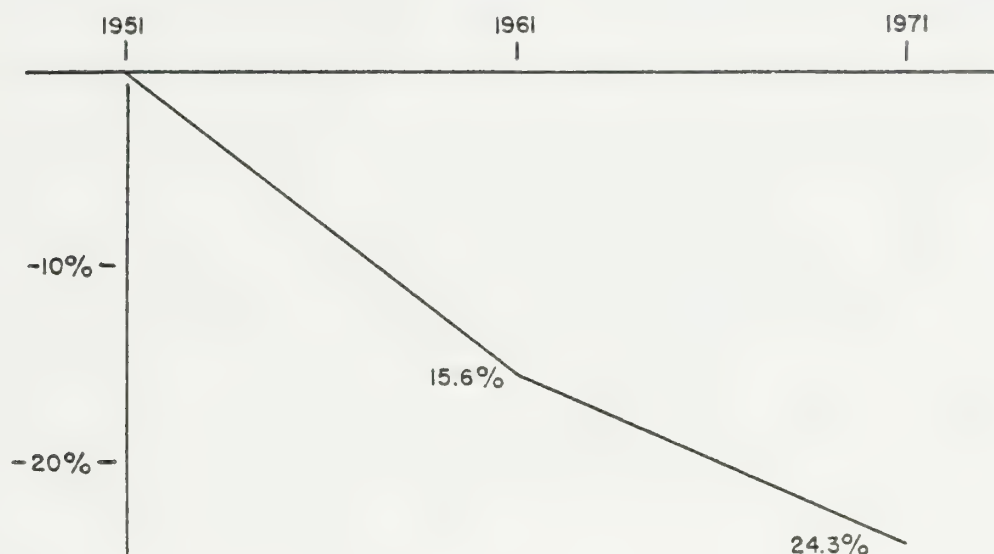
It is further expected that because of structural changes that will take place in the economy, capital needs will already be so extensive that the extra task of compensating for the scarcity of labour may be very costly. Output per man hour is foreseen as declining slightly after 1980 as a consequence.

Greater growth in turn, would be heavily dependent on foreign capital or labour. Indications are that the former is more likely to contribute any appreciable increase.

The economy of Hamilton has, in many respects, paralleled that of the nation. Both have experienced a decline in manufacturing employment as a percentage of the total labour force as evidenced by the following graphs:

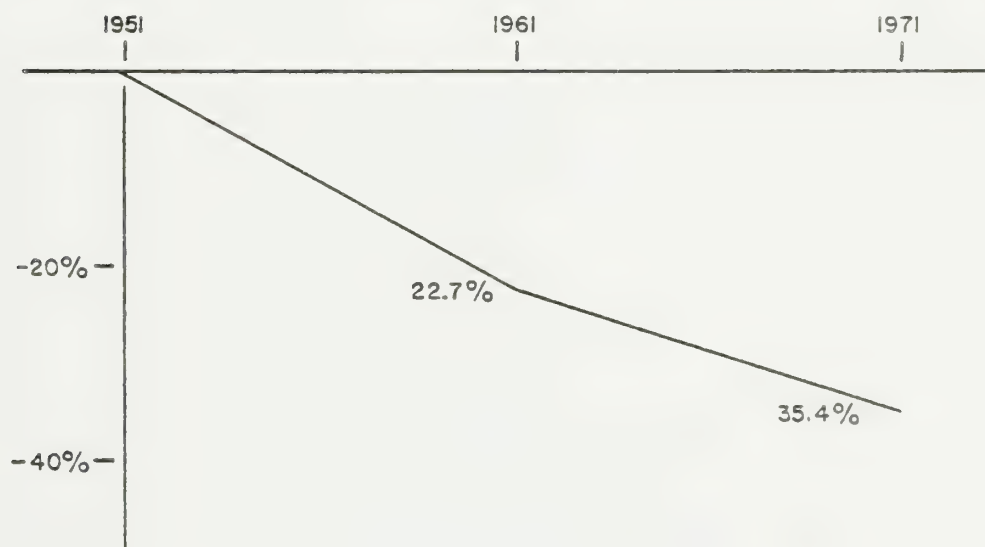
Figure 11

CANADA



Index for manufacturing labour force as a percentage of total labour force - Hamilton and Canada, 1951 - 1971.

HAMILTON



On this basis it is believed that the City of Hamilton will share a similar future insofar as industrial growth is concerned.

Ontario

As in the past, it is anticipated that Ontario will continue as the forerunner in terms of provincial productivity.

Manufacturing employment in the City's resident labour force increased by some 3,300 jobs or 7.3% between the years 1961 and 1971. The corresponding percentage increase for Ontario was 27.4% which demonstrates that for the most part, growth in the Province's manufacturing labour force was taking place at a much faster rate than for Hamilton. The increase for Hamilton Metropolitan Area, although not up to the Provincial figure, was 20% which substantiates the claim that the greatest growth in the Region's industrial employment is occurring in the area municipalities surrounding the City of Hamilton.

In using a shift and share analysis, it was observed that the net relative change between 1961 and 1971 (or the difference between the actual growth in manufacturing employment in the City and the level of employment had the City grown at the Provincial rate), was - 7,929. By the same methodology, had Hamilton's growth rate equalled that of the County, the City would have created a total of 5,700 more jobs than occurred during this period.

As previously mentioned, for the purposes of industrial location, the City of Hamilton is in direct competition with other area municipalities and Regions. Any attempt to determine its appeal to industry must realistically include an examination of the Region's performance in respect to the competition.

The Region's Economic Base Study documents the Regional share of manufacturing growth as compared to that of the Province at large. Its findings reveal that Wentworth County became a less attractive location for industries in the food and beverage, rubber products, paper products, printing and publishing, metal fabricating and machinery industry groups. In the electrical products group there was a substantial loss in the communications equipment industry and a gain in the manufacturers of major appliances industry. The County became a more attractive production location for the leather, textile, clothing and primary metals industry groups. The largest gains were in

the iron and steel mills and major appliance industries. Assuming that Hamilton-Wentworth's ability to attract and nurture manufacturing remains relatively constant, it would be reasonable to expect that the Region will continue to gain an increasing share of production in those industries in which it had a positive regional share.

In terms of future growth in the Lakeshore urban complex of the Toronto-Centred Region (Hamilton to Oshawa), Wentworth County is envisaged as absorbing an increasingly smaller portion of the T.C.R.'s growth. Demographic studies by the Metropolitan/Planning Department, together with certain Provincial and Federal Departments have resulted in a projected decline in Wentworth's population growth from 5.2 in 1976 to 4.2 in 1986 as a percentage of growth in the T.C.R. The forecasts include an allowance for the trends in inter-municipal migration that has taken place in recent years. They do not, however, reflect stated government policies or projects outlined in the following section.

Indications are then, that the Region will continue to experience a lesser overall growth rate in manufacturing than the Province as a whole, and, that the City of Hamilton will in turn achieve a somewhat lesser percentage increase than the Region.

Central Ontario Lakeshore Urban Complex (COLUC)

In January 1974 the regional government program for the north shore of Lake Ontario was completed with the inauguration of Durham, Peel, Halton and Hamilton-Wentworth. Together with Metropolitan Toronto and York, they form the Central Ontario Lakeshore Urban Complex within the larger Central Ontario Region. Each regional municipality is an independent planning area under the Planning Act and each will produce an official plan for the area under its jurisdiction.

Overall regional planning strategies, however, remain the responsibility of the province. The COLUC proposal is regional planning strategy, and as such falls within the bounds of the province's responsibility. If and when it is implemented will be the decision of Queens Park. Nonetheless, its significance for industry in Hamilton should be examined.

The COLUC study outlined in general terms policies which may have implications to Hamilton's industrial sector. The study recommended that each urban place be assigned a specific role and function within the urban complex. Hamilton was designated as a regional centre to supply services to the surrounding urban areas and to provide diverse living and working conditions to the citizens of the Hamilton sub-region. To accomplish this it was proposed that higher order services be attracted to Hamilton in order to diversify the economic base. This would in effect create an imbalance between the number of job opportunities and the number of resident workers necessitating daily migration from smaller centres.

The task force proposed that economic activity east of Toronto should be supported by provincial government policies in order that the economic situation in the eastern corridor of the COLUC area be strengthened. Support in the form of incentives to industry through improved services, availability of land and the possibility of financial assistance are several of the measures designed to decentralize the population of Metropolitan Toronto and the Western Corridor. Industries which derive marginal locational advantage from being situated in Hamilton could be enticed from the area.

The study further recommended that urban growth be restrained to the south and east of Hamilton, that orchards and farmlands above the escarpment and east of Hamilton be preserved and that natural resource features north and northwest of Hamilton be protected from urban growth. A strict policy of conservation coupled with an increased demand for land for residential, transportation, open space,

industrial and other urban growth will produce a sufficiently tight land market which could be instrumental in discouraging land extensive industry from locating or remaining in Hamilton. Policies to keep land at a premium in the west would place the eastern corridor in a competitive position as far as this locational feature is concerned.

The COLUC task force recognized the shift in employment that has been taking place in Hamilton from predominantly manufacturing activities to higher-order services. It was recommended that the provincial emphasis should be to retain and stimulate the existing manufacturing and processing functions and to diversify the economic base of Hamilton by encouraging the location of higher-order service functions to further enhance and broaden Hamilton's role as a regional centre.

The possibility of environmental incompatibility was not discussed in relation to this diversification and must be considered by the City prior to implementation of provincial policies.

Since conversion of relatively low priced industrial land to commercial or retail use is extremely profitable, higher order services may occur at the expense of industrial growth and activity.

The effective implementation of Provincial policies by municipalities necessitate utmost co-operation between the municipalities and the province and presumes a high degree of physical and functional integration within the COLUC area. This would, in effect, require a greater delegation to the Province of municipal power as given under the Planning Act to plan and provide for growth. The autonomy of the municipalities would be decreased for all practical planning purposes. It is unlikely that Hamilton would strive for implementation of COLUC goals to redirect economic growth by stimulation

of activity in the Eastern corridor if such goals were to Hamilton's disadvantage.

Hamilton was admittedly not considered in relation to its actual region of influence; the task force suggested that a more comprehensive study be carried out in order to better establish Hamilton's regional economic role. The COLUC study area did not coincide with the Hamilton hinterland which stretches from Niagara to Kitchener-Waterloo. While the study has some relevance it remains somewhat ambiguous in reference to industry in the Hamilton area.

Chapter 4

Employment Projections and Demand for Industrial Land to 1986

4.1 Study Area

Although the policies comprising the Official Plan Amendment must by definition be concerned with industry within the City of Hamilton, the nature and magnitude of this activity is such that these policies must be designed within the context of a much larger sphere. This entailed analyzing those external factors which influence the path of industrial development.

4.2 Data Base

Perhaps the most frustrating aspect of industrial forecasting is the inconsistency and incompleteness of the data base with which one must work. This places immediate limitations on any quantitative analysis.

Because much of Hamilton's labour force commutes from other area municipalities throughout the Region, it is necessary to examine industry's regional status. Problems arise, however, when an attempt is made to compare the existing situation with that of the past. The municipalities which, for statistical purposes, are included in the Hamilton Metropolitan Area and the Regional Municipality of Hamilton-Wentworth, vary from one census to another. The very boundaries which define these municipalities change periodically as does the definition and respective categories of manufacturing for census information.

4.3 Factors Affecting Industrial Land Use

Industrial location factors are not constants. Their collective significance responds to changes within the free market.

Each location decision entails a comprehensive assessment of three broad categories of cost:

- 1) Input Costs: Labour, materials, municipal services, fuel, land, taxes
- 2) Transport Costs: the price of a composite input of services necessary to move labour, materials and products
- 3) Plant Economies: these are a set of relatively localized scale economies that may be internal to the plant, or external to the industry at a given location.

Certain of these costs can be influenced to some degree by local policy which is largely the subject matter of the Official Plan Amendment.

It is essential, however, to maintain an awareness of other outside factors over which there is little or no control, as they dictate a realistic framework within which to develop what effectively is a local plan.

External factors influencing Hamilton's locational advantages may be explained in terms of the city's location inputs relative to those of other urban centres in the regional, provincial, and even national sphere.

This oscillation is subject to such parameters as:

- 1) Shift in markets
- 2) Changes in transportation technology
- 3) Relative impact and distribution of labour
- 4) Changes in plant marketing and distribution policies
- 5) Changes in government policy

Consequently, Hamilton's sphere of influence is largely a function of the respective locational requirements of varying types of industry. It is dependent on the weight each industry allots to a given factor.

The City's attractiveness as a site for plant location or expansion then is cyclic.

It is the free market that delimits the spectrum of realistic industrial location. Attempts to solicit industry must accept the following premises:

- 1) Competition for industrial location and expansion is intensifying.
- 2) Manufacturing interests must be re-assessed on functional merit rather than a historical basis.
- 3) Hamilton must concentrate its efforts on improving those internal factors which are of greatest significance to the types of industry that may potentially expand in this region.

4 Factors Affecting Employment

The Canadian economy has long been plagued by the fact that there are more workers than work. Growth in the number of persons employed is therefore largely a function of the growth in jobs. In times of no real growth in the G.N.P., the number of new workers entering the labour force exceeds the number of new jobs being created. It has been estimated that the real G.N.P. must grow at a rate of 4 percent/annum to absorb this yearly increase in workers, and thus maintain a constant level of unemployment.

Unemployment is, however, subject to certain factors independent of the overall growth of jobs. They include;

A) Productivity -

Output per worker has risen considerably due to automation and various technological innovations. Economic Council projections, however, envisage a marked decline in this respect after 1980.

B) New Industries and job categories -

The shift to a service-oriented economy created a number of industries and professions. The economy is constantly evolving additional jobs of this nature and could provide additional positions in such fields as transportation, energy and recycling.

C) Participation in the labour force -

The participation rate, both male and female, determines the numbers of persons seeking employment.

D) Age structure

The number of persons of working age (presently 16 - 65) is further related to the age composition of the population. The Cohort Survival Technique is commonly used to predict the potential labour force on this basis.

E) Immigration -

Immigration at whatever level (National, Regional, Municipal) traditionally concentrates prospective workers in large urban areas.

F) Regional Population -

The spatial distribution of the labour force by place of work and by place of residence determines the nuclei and commuter municipalities within the region.

SYNOPSIS

From this quagmire of variables surfaces four general boundaries within which to perform.

- 1) The urban system is ADAPTIVE rather than a mechanical system. It rolls with the punches, continually shifting its structure in a complex and on-going fashion.
- 2) It is an OPEN system, and as such cannot be studied (or planned) independent of the external influences which define it.
- 3) It is characterized by INTERDEPENDENT parts, and must be examined in its entirety.
- 4) The urban system is characterized by a SUBSTITUTABILITY of parts and functions implying that the detection of new and interdependent trends is difficult as they are often disguised by the apparent suitability of the parts.

4.5 An Assessment of Comparative Methodologies and their Utility

It is widely recognized that forecasting economic activity is one of the most hazardous tasks for economic and physical planners. The factors to be considered are both numerous and complex. Nonetheless, it is equally agreed that some sort of forecast is better than none at all. This can be justified in lieu of the fact that:

- a) Large and complex systems are more stable and hence more predictable than smaller, simpler ones.
- b) Both employment and population forecasts are an integral part of the framework required to provide the dimensions for a physical plan for land use and transportation. Both sets of figures provide a reference point

for guiding the process of estimating the demand for land and the composition of various areas of land use.

- c) A plan based on long-range forecasts should be viewed as providing a strategic framework for the guidance of change through the foreseeable future; a broad and general sense of direction which gives firm advice on short term developments, and a consistent set of policies which could be responsive to unforeseen developments as they arise. Plans drawn up in this perspective make as much use of regularly produced and revised short-term projections. Their very flexibility means that they do not stand or fall on points of long range forecasting technique.

Several methods have been devised for this purpose, all of which are variations of three principle techniques.

- i) Input-Output or interindustry analysis, provides the most detailed analysis of the local economy. It is an attempt to assess the mutual interdependence of local producing sectors, and ultimately determine the systems reaction to economic stimulus.
- ii) An Economic Base Study is a method for examination of a local economy in order that a community may have a clearer and more accurate understanding of how it earns its living. It is concerned with those activities which give the source and level of employment and income.
- iii) Ratio/Apportionment, or location quotient is a macro-cosmic method that compares employment within a city or region to provincial national means of employment.

This technique rests on the observation that the share (whether of total employment, production or employment in a particular sector of industry)

which any area possesses of the respective total for a larger 'parent' area exhibits regularity and stability over time.

For example, if a region has had about 7% of the national employment over a considerable period, it is argued that there is little likelihood that it will be above or below 7% in the foreseeable future, if current and past conditions prevail.

Equally, if that area had experienced a consistently falling share of the ratio total of a certain type of employment, then it is reasonable to suppose that its share will continue to decline, again, assuming that no outside influences affect it. Ratio/apportionment methods rely on this regularity or inertia in order to make their forecasts for successively smaller areas arranged in a hierarchical fashion.

At present almost 60% of Canada's basic steel products are produced in the Hamilton-Wentworth Region. This percentage is very much likely to diminish in the years to come in light of significant developments in the primary steel industry throughout the Province and Nation.

Many fall prey to the impressionism of the present - what is. In assessing the potential for growth, one must not, however, be unduly influenced by prosperity that is the product of the past, and assume that those conditions responsible for the growth generated are in evidence or significant in today's world, or that of the future.

4.6 Potential Growth by type of Industry

This section in analyzing potential growth is concerned with the prospective performance of those industries that generate employment opportunities within the City of Hamilton. In considering past trends, it should be noted that economic indicators are thus derived where possible by place of work and not residence.

Food and Beverage Industries Include

- | | |
|----------------------------------|------------------|
| - Meat and Poultry Products | - Fish Products |
| - Fruit and Vegetable Processing | - Dairy Products |
| - Flour & Cereal Products | - Feed Industry |
| - Bakery Products | - Beverages |

The Food and Beverage group of industries consists of eight classes that encompass a wide range of businesses. Although exhibiting a relatively steady growth rate to 1975, it has been at a rate below that of all manufacturing.

Production has risen independently of employment due, for the most part, to increasing automation. Another noteworthy factor has been the increased efficiency of plant operations that have evolved through various production sharing agreements and the amalgamation of smaller companies.

Growth in this industrial division is largely a product of growth in the population it serves. Peter Barnard Associates anticipate that the population increase for the City of Hamilton will average 0.7% per annum to 1986, thus generating an additional 23,000 people over the 10 years to this date. This is a somewhat moderate figure and should be readily accommodated by further sales to existing firms rather than the wholesale establishment of new firms.

If, however, the present unavailability of land for growth of this nature persists, what little on-site expansion that does occur will be offset by the continued rationalization and automation of the industry.

Without Council policies to ensure the provision of additional lands for the establishment and expansion of this industry, many new food and beverage firms can be expected to favour a location in the suburbs where access to highway transportation is assured and automation reduces the need for inexpensive labour in proximity to the plant. This development will have greater consequences for the lower city where 10 of the city's 11 new firms located during the 1966 to 1972 period.

Employment will grow slowly, if at all, and will be characterized by a gradual shift from inner to outer areas as new plants replace the old.

Tobacco Products Inclusive

- Leaf Tobacco Processors
- Tobacco Products Manufacturers

This group of industries is very small, and accounts for only a minute fraction of the economy and employment of Hamilton. In 1971 it provided only 20 jobs or less than 0.1% of the total. This employment level is the result of a sharp decline that has occurred since 1961.

There is no reason to expect an appreciable change over the years ahead.

Rubber and Plastics Products Inclusive

- Rubber Products
- Plastics Fabricating

The Standard Industrial Classification for this group was changed in 1970 to include Plastic Products. Previously it had only covered rubber goods. As a result there is a break in the series at this point that must be allowed for in interpreting the data.

This group contained about 1,900 people in 1971 or 3.2% of the city's manufacturing labour force, most of whom were employed by the Firestone Tire & Rubber Company. The growth of this industry is strongly related to the performance of the latter and has fluctuated accordingly. Overall, this growth has been moderate but steady with some 2,050 employees reported for Firestone in 1974.

This trend appears likely to continue with the increased demand for automobiles in Southern Ontario. Gains in rubber, however, are likely to originate via less labour intensive warehousing rather than production lines. New production outlets are more likely to locate in areas outside of the City if not the Region.

Plastics Fabricating operations are smaller as a rule and less dependent on access to bulky raw materials than their counterpart. The East Mountain Industrial Park should help compensate for the trend to locations in other area municipalities where 6 of 9 new plastics firms located between 1966 - 1972.

Employment will rise gradually at a rate approaching that of overall manufacturing.

Leather Products Inclusive

- | | |
|---------------------------|---|
| - Leather Tanneries | - Shoe Factories |
| - Leather Glove Factories | - Luggage, Handbag and small
Leather Goods Manufacturers |

Leather Products although providing less than 500 of the manufacturing jobs in the City of Hamilton have demonstrated a consistent growth trend since 1951. International competition and the labour intensive nature of this group have checked expansion of the industry at large.

It is anticipated that change will be gradual, with a modest increase in employment.

Textiles Inclusive

- | | |
|---------------------------------|------------------------------------|
| - Cotton Yarn and Cloth Mills | - Wool Yarn and Cloth Mills |
| - Man-Made Fibres | - Felt and Fibre Processing |
| - Automobile Fabric Accessories | - Canvas, Cotton and Jute Products |
| - Carpet, Mat and Rugs | |

This group consists of a broad range of industries, many of which have been established for some years. Textiles have staged a partial recovery since experiencing a sharp decline in the 1950's and early 60's and now register a labour force of some 2,000 people. This recovery has obscured the variations in the performance of individual industries. Surprisingly, the impact of synthetics has been delivered from outside of the City as man-made fibres play a minor role in the make-up of the group.

Gains in the production of synthetics has been rapid but remains as a modest generator of employment opportunities as they are highly automated operations.

The smaller firms are fast becoming amalgamated by the larger more economical companies. This will continue to occur until such time as employment is concentrated in several large firms. The latter rely more on technology than manpower for increased production, and this should be reflected in little if any growth in total employment.

Clothing and Knitting Mills Inclusive

- | | |
|-----------------------|--------------------|
| - Men's clothing | - Women's Clothing |
| - Children's Clothing | - Fur Goods |
| - Foundation Garments | |
| - Knitting Mills | - Hosiery Mills |

Clothing and Knitting, although considered as individual industries for census purposes since 1962, are combined to facilitate a comparison with statistics compiled before this date. Knitting mills account for about 15% of the employment in this group.

In 1971 these industries employed about 1,450 in the City of Hamilton. Production has been experiencing a relatively steady growth rate, and, as was the case for Textiles, this group appears to have regained a portion of the market lost in the years to 1961. The industry remains labour intensive and it is only recently that mass production, in an attempt to stave foreign competition, has accounted for an increasing share of the business.

There is a noteworthy discrepancy between the employment figures obtained from the 1971 Census of Manufacturers (from which the graphs were derived in Section 2.2) and the 1971 Population Census (Appendix). A possible explanation is that a high proportion of the labour in the garment industry are women immigrants, many of whom may have been reluctant or unavailable to declare their occupation to the Census takers. The Census of Manufactures on the other hand is obtained from payrolls.

The Clothing and Knitting industry is almost entirely concentrated in Toronto and Hamilton. Hamilton's share has increased appreciably in recent years but is still under 10% of the total. This trend is likely to continue in the future due for the most part to the City's supply of suitable labour. The gains accrued from this development, however, will be offset by the shift of industry to the suburbs together with the fact that growth, whether newly established or a product of amalgamation, is characterized by more efficient operations that employ correspondingly less staff.

Wood Industries Inclusive

- | | |
|--|---------------------------------|
| - Sawmills, Planing Mills and
Shingle Mills | - Veneer and Plywood Mills |
| - Wooden Box Factories | - Sash Door and Millwork Plants |
| | - Coffin and Casket industries |

With only 125 employees in 1971, Wood products play a minimal role in the manufacturing economy of this City. Production, Number of Establishments, and Employment have fluctuated since 1961, peaking around 1966 and followed in each instance by a steady decline to the 1971 Census.

The industry is mainly allied with construction and consumer products. Barnard's forecast of a 0.7% annual population growth rate to 1986 suggests a modest performance for housing construction to this date. Of greater consequence is the projected average annual mix of Apartments (64%), Row (6%), Semis (5%) and Singles (25%) to 1981, as multiple dwellings demand less wooden materials. The prospects for this group then is a gradual return to 1961 levels at best.

Furniture and Fixtures Inclusive

- Household Furniture
- Office Furniture
- Electric Lamp and Shade Manufactures

Less than 200 people were employed in this group in the City of Hamilton in 1971. These industries have been increasing their production at a rate exceeding that of overall manufacturing. Their employment, however, has declined marginally since 1961 which reflects greater efficiency and modularization in the industry. It is questionable whether this trend can continue without the introduction of automated production lines aimed at more of the market. This is unlikely as the market grows in accordance with population and prosperity, neither of which is expected to repeat its rapid growth rate of the 1960's. Employment then, should grow slightly among the City's established firms, with additional developments in the East Mountain Industrial Park.

Paper and Allied Industries Inclusive

- Pulp and Paper Mills
- Asphalt Roofing Manufactures
- Paper Box and Bag Manufactures

Almost 1300 people are employed in this group, predominantly in the Paper Bag and Box industry. The latter is heavily automated and is capable of satisfying increased demand at short notice without necessarily hiring additional staff. Furthermore, it maintains a strong link with the Food and Beverage industry and should respond accordingly in the future. It is expected that growth in employment will be below that of overall industry with the greatest expansion in new rather than existing plants.

Printing, Publishing & Allied Industries Inclusive

- Commercial Printing
- Platemaking, Typesetting and Trade
- Publishing and Printing
- Bindery Industry
- Publishing Only

According to the Census of Manufactures, employment in this group declined by 10% between the years 1966 - 1971. Since 1961, however, Production has increased by about the same figure. In an effort to compete with the media industry at large, this group has evolved significant technological changes, hence the rise in output. The introduction of new equipment and the construction of new plants has characterized this industry throughout the Province. The recent move to West Hamilton by the Spectator re-affirms this trend on a local scale.

Each of the 15 firms that commenced operations in the City of Hamilton between 1966 and 1972 were characterized by remarkably small work forces, the largest employing only 15 persons. In terms of new establishments, Commercial Printing with 10 starts, dominated this expansion. This is a classic example of an industry that is dependent upon immediate access to the Core area and its arteries. Each of the successful businesses located below the escarpment where most of the office commercial and administrative functions are situated.

Rezoning such as those in Beasley and Central neighbourhoods may seriously jeopardize the viability of such industries.

Employment in Hamilton will likely grow slowly and be confined for the most part to areas in the lower city until such time as the mountain develops more extensively higher order functions.

Primary Metal Industries Inclusive

- | | |
|------------------------------|-----------------------------------|
| - Iron and Steel Mills | - Steel Pipe and Tube |
| - Iron Foundaries | - Smelting, Refining and Aluminum |
| - Copper Rolling Casting and | Rolling |
| Extruding | - Other Metal Rolling Casting and |
| | Extruding |

The primary metal or the steel industry in the City of Hamilton clearly dominates the manufacturing sector accounting for 42% of manufacturing employment in 1971. At present more than half of Canada's basic steel products are produced in the Hamilton-Wentworth Region primarily by the Steel Company of Canada, and by Dominion Foundaries and Steel. During the

years 1971 - 1974, these two companies invested over \$400 million for expanded production facilities and pollution control equipment. Combined steel production by Stelco and Dofasco is now about 6 million tons, 35% above the 1971 level. Further expansion by Stelco will take place at Nanticoke outside of the Region, but Dofasco has acquired a sizeable tract of land adjacent to its present facilities which will allow for a doubling of capacity together with an increase in employment of around 4,000 in the future.

Metal Fabricating Inclusive

- | | |
|--|--|
| - Boiler and Plate Works | - Fabricated Structural Metal Industry |
| - Ornamental and Architectural Metal | - Wire and Wire Products |
| - Metal Stamping, Pressing and Coating | - Hardware Tool and Cutlery |
| - Heating Equipment Manufactures | - Machine Shops |

The primary steel industry has also encouraged the development of a competitive metal products industry. The production performance of this group has matched that of total manufacturing and exhibits a considerable degree of consistency from one sub-component to another.

Recently some concern has arisen over the shift of this industry to surrounding area municipalities, notably Stoney Creek and Burlington. This resulted in a loss of some 400 jobs in terms of the City's residential labour force between 1961 and 1971. Gains occurred between 1971 and 1975 when, according to the Region's Business Survey, existing firms expanded their staff by some 500 positions. New growth, however, continues to favour a location outside of the City limits. Only 12 of the 35 plants established between 1966 - 1972 selected Hamilton for their site.

Bater and Walker's linkage study of Hamilton's metal industries (1971) noted that three-quarters of the market was within the Province, predominantly Southern Ontario. The latter is traditionally a high growth area and should provide a significant increase in the demand for metal products.

As a group, production in the Metal Fabricating industries is likely to expand somewhat faster than that of overall manufacturing because of more efficient technology. It is anticipated that employment in the City will increase at a diminishing rate and will probably stabilize unless provision is made for the incubator industries that characterize this group.

Machinery Inclusive

- | | |
|--------------------------------|-------------------------------|
| - Agricultural Implements | - Miscellaneous Machinery and |
| - Commercial Refrigeration and | Equipment |
| Air Conditioning | - Office and Store Machinery |

Machinery industries experienced a rapid increase to 1966, much greater than the manufacturing average, after which the group declined sharply. This reflects the fortunes of Agricultural Implements, the major sub-component, over this period. Since 1971, employment in the firms considered for the purposes of the Region's Business Survey has increased by over 700 positions. This figure was recently reduced by the relocation of John Deere Ltd. (1906) to Grimsby, a move that resulted in the loss of 200 jobs.

The dominance of the Agricultural Implements industry introduces an element of uncertainty because of the repercussions associated with doing business in an international economy. On-site expansion by the machinery plants surveyed was envisaged as providing employment for an additional 450 persons which suggests a reduced growth rate for this group.

Transportation Equipment Inclusive

- | | |
|-------------------------------|----------------------------|
| - Aircraft and Aircraft Parts | - Motor Vehicles and Parts |
| - Truck Body and Trailer | - Railroad Rolling Stock |
| - Shipbuilding and Repair | - Boat building and Repair |

The Transportation Equipment sector employed 1800 persons in 1971. This group is dominated by the Railroad Rolling Stock and the Motor Vehicle and Parts industries, represented for the most part by National Steel Car Corp. Ltd. and Allen Industries Canada Ltd. respectively.

The performance of the railroading industry is often directly dependent on government programs and orders as evidenced by fluctuating employment levels. As such it is difficult to formulate an accurate assessment of future growth.

Once a U.S. stronghold, the automotive parts industry is increasingly relying on Canadian based plants as a source for manufacturing and distribution. The outlook for this sub-group is somewhat promising in light of the increase envisaged in the country's marketable population. With little growth in the number of establishments since 1966, however, it appears that expansion of the labour force will favour existing rather than new firms. The attraction of the East Mountain Industrial Park for the latter will be greatly influenced by the timing and efficiency of the transportation link to the Queen Elizabeth Way.

Electrical Products Inclusive

- | | |
|-------------------------------|--|
| - Small Electrical Appliances | - Major Appliances |
| - Lighting Fixtures | - Household Radio and Television Receivers |
| - Communications Equipment | - Electrical Industrial Equipment |

Electrical Products constitute an important group in the Hamilton industrial economy, employing 5,700 or 10% of the manufacturing labour force in 1971. Increases in production have been consistent, notably in electrical industrial equipment, major appliances and communications equipment, the three major sub-components of the industry.

Future growth in employment is expected to be marginal insofar as the existing developed areas are concerned because of the shortage of suitable land for expansion. The East Mountain Industrial Park should accommodate lighter manufacturing such as lighting fixtures and communications equipment generating a modest increase in employment of this nature.

Non-Metallic Mineral Products Inclusive

- Clay Products
- Stone Products
- Ready-mix Concrete
- Abrasives Manufactures
- Cement Manufactures
- Concrete Products
- Glass and Glass Products
- Lime Manufactures

This range of industries employed 2,250 persons in 1971, declining slightly from the figure in 1966. The overall production trend in the Non-Metallic Mineral group is similar to that of capital formation in construction as many of the products are utilized for this purpose.

The prospects for continued growth in production is also linked to the degree of sustained growth in population. Barnard's projected rates of population increase for the Region and City are 0.8% and 0.7% per annum respectively to 1986. The trend to fewer persons per household will continue and thus generate a greater percentage increase in the demand for households, thus aiding the construction industry slightly.

Overall, because of the mechanized approach of this group, the increase in production envisaged will likely be accommodated by existing facilities rather than a significant rise in employment.

Petroleum and Coal Products Inclusive

This group plays a relatively insignificant role in the city's economic structure, employing only 180 persons in 1971. Petroleum storage areas have traditionally favoured the Bayfront area. Increased land values and changing marketing conditions, however, have led certain of the firms

(Texaco and Imperial Oil) to close down their operations in this area. Real Estate values are too prohibitive to expect any further development along these lines. As a result, little change is anticipated for these industries.

Chemical and Chemical Products Inclusive

- Mixed Fertilizers
- Paint and Varnish
- Toilet Preparations
- Plastics and Synthetic Resins
- Soap and Cleaning Compounds
- Industrial Chemicals
- Pharmaceuticals and Medicines

During the period of rapid national employment growth from 1961 to 1966, both the labour force and value of production for this group rose by about 15 percent. Since that date chemicals have returned to the 1961 level and appear to have stabilized.

Half of the industry's 2,000 employees can be found in the Procter and Gamble Co. of Canada Ltd. with the remainder dispersed among the other sub-groups. The Soap and Cleaning Compounds industry has reached a level of market saturation where growth in production corresponds with that of the population it serves. Little growth in employment is forecast because of this development, together with the fact that the Chemical industry at large is highly automated.

4.7 Employment and Industrial Land Projections for the City of Hamilton 1976 - 1986

Any attempt to forecast future economic conditions must firstly define the parameters employed in the projection together with the underlying assumptions upon which it is based.

For the purposes of this Industrial Official Plan Amendment it is assumed that:

- 1) Provision of manufacturing employment to accomodate any increase in the City's resident labour force (taxpayers) is paramount.
- 2) In terms of the urban complex of which Hamilton is a part, the City serves as a sub-regional centre, and will continue to provide manufacturing employment for urban areas beyond its legal boundaries.
- 3) The development of large acreages of additional industrial lands will take place in other area municipalities throughout the region rather than the City of Hamilton proper.

As outlined in the early part of this chapter, there are numerous factors which affect the evolution of employment and industrial land use. One of the most significant considerations involves quantifying the population base with which one must work. The Barnard Associates' reports on future housing requirements for the City of Hamilton and the Regional Municipality of Hamilton-Wentworth serve as the input for population statistics. Using the 1975 Assessment records as the base year and Barnard's growth rates of 0.7% and 0.8% per annum to 1986 for the City

Region respectively, it is anticipated that the populations will reach 336,800 and 449,500 by this date.

Estimates of labour force are customarily obtained from population projections and participation rates. The latter are calculated by sex and age groups to better assess the makeup of the working age population. It does not necessarily follow that all members of working age will be actively engaged in employment. Certain age groups are characterized by a higher level of involvement than others. The 15 - 19 age group traditionally portrays the lowest percentage contribution. Women leave the labour force in great numbers after the age of about 25, and return gradually as family commitments lessen. Still others may be unemployed. The ratio of those actively engaged in work, and those of working age increased from 55% in 1965 to its present approximated ratio of 60% according to Statistics Canada Catalogue No. 71 - 001.

The most common means of measuring employment is simply to calculate the residential labour force as a percentage of the population. This population and employment ratio for the City of Hamilton was 44% in 1971, up from 41% in 1961. (Census). In light of the changing age structure of the population, it is anticipated that this increase will continue along its present lines and reach 48% by 1986.

Of the participating work force, the percentage employed in manufacturing has been declining steadily since 1951. Section 3.3 outlined the similarity between the rate of decline for manufacturing in the City of Hamilton and that of the nation as a whole. Based on the projected decline noted in the Economic Council of Canada's 11th Annual Revue, it is expected that this rate will approach 33% of the overall labour force.

According to Barnard's forecasts, the City will experience a growth of some 25 000 additional people to 1986, versus a figure of 16,500 for the remainder of the Hamilton-Wentworth Region.

Of some consequence to any future manufacturing scenario is the role Hamilton plays as an employment centre for other communities. The Town of Burlington accounts for greater than half of the 9,000 (net inflow) persons who commute to the city for a manufacturing job. Burlington's anticipated growth rate of 4 per cent to 1986 has obvious implications to employment projections. The ratio of Burlington's commuting labour force is expected to decline as the town further develops its 3,000 acre reserve of industrial land. Nonetheless, it will remain as the major commuter municipality accounting for about 7,500 of the 12,000 net manufacturing migrants by 1986.

As the city's population levels off, the rate of increase in service oriented employment declines due primarily because of the high dependency on the needs of the immediate residents. Manufacturing, however, as a more basic industry, has demonstrated that it functions in accordance with an external economy and is capable of experiencing growth independently of that of the city at large. This produces a stabilizing effect on the composition of the labour force, lessening the recent inertia of the service economy. Consequently, the participation rate in manufacturing is expected to decline less notably than in the past. The presence of the manufacturing industry as a growth generating factor, is reflected in a higher participation rate, more so than any appreciable increase in population.

Assuming the interest of the residential labour force are primary, 53,350 manufacturing positions must be made available for those persons who wish to reside and work in the City of Hamilton. An additional 12,000

people will rely on Hamilton as a place of work and commute to their jobs from outside of the city limits, bringing the total manufacturing positions required to 65,350. In 1971, Hamilton furnished a total of 59,000 manufacturing jobs to both residents and commuters. An additional net increase of some 6,350 positions is thus required to 1986.

Based on the densities of other industrial parks throughout Canada that have attracted industries similar to those found in the East Mountain Industrial Park, a figure of 12 workers per gross acre was evolved for this area. Thus it can be expected that the Mountain Industrial Park will accomodate a total of about 8,700 positions. Caution must be exercised in interpreting this estimate as many of these jobs will merely be "transfers" from those existing firms re-locating to the Park from areas within the city. To better quantify this eventuality, it was necessary to consult the Industrial Development Branch of the Ministry of Industry and Tourism. The 1973 Ontario Summary of New and Expanded Manufacturing Facilities notes that 65% of the 454 plants established or expanded in this year were firms previously in existence. The remainder were new firms. The City's Real Estate Department affirms a similar development pattern to date on the Mountain which suggests this documentation to be accurate and applicable to Hamilton. Many of the "expanded" firms are seeking the additional space associated with newly developed industrial land and as such do not generate a corresponding increase in employment. Consequently, it is envisaged that the East Mountain Industrial Park will generate approximately 3,250 new employment opportunities when fully developed.

The remaining net increase of about 3,100 additional manufacturing jobs will arise from implementing the policies section of this Official Plan. Such policy statements are intended to recognize and protect the interests of industry in order to maintain an economical base for the existence and

co-existence of this land use. The loss of industrial assessment, manufacturing jobs and the multiplier effect associated with an industrial base such as exists in Hamilton will continue if action is not taken to update the 1951 Official Plan.

A net increase of this magnitude must overcome such losses as John Deere and potentially Slater Steel (400 and 1,500 jobs respectively) together with the losses resulting from numerous re-zonings in the City's developed neighbourhoods. The concept of a mixed industrial-residential land use designation as defined, together with the introduction of industrial malls such as the Hamilton Industrial Mall in Stoney Creek should partially offset the migration of industry to elsewhere in the city's economic region.

In view of the staging of services and recent sales records, it is anticipated that the East Mountain Industrial Park will, with the implementation of the policies outlined in this Official Plan, satisfy the city's demand for industrial land until 1986. After this date, it is believed that little or not appreciable industrial acreage will be available in the City of Hamilton.

However, the preferred development pattern for the Region designates some 750 acres of prestige industrial land in the Township of Glanbrook immediately to the south of Hamilton's East, together with 1420 acres in Stoney Creek, 700 acres in Ancaster and 300 acres in Flamborough. This additional acreage is situated in proximity to the city's labour force and should provide sufficient employment opportunities for a growing residential labour pool

Chapter 5 Industrial Land Policy

5.1 Introduction

The provision of land for industrial development in Hamilton was carried out on a private basis until the early 1960's when the City of Hamilton began to acquire and develop land for industrial purposes. Public involvement with industrial land acquisition has since increased. At the present time the majority of new lands brought into industrial use have been publicly developed.

Private land holders in Hamilton are not involved to a large extent with the development of industrial land since, due to scale economics and returns, only large tracts of land can be profitably developed. The City of Hamilton is in a better position to develop the smaller parcels of land since they are ultimately concerned, not with sales profits but rather with the creation of employment opportunities together with the resultant broadening of the tax base.

Speculation tax and the cost and phasing of services also act as deterrents to participation by the private sector in the development of industrial land. If the City of Hamilton wishes to attract and accommodate future industrial growth, an adequate supply of serviced land must be made available. This would require a coordinated effort by the City to encourage and invite industrial land development proposals from the private sector.

5.2 Existing Land Use Policy

The Official Plan of the City of Hamilton as approved by the Provincial Government in 1951 sought to establish a general pattern of land use by:

- a) allocating each portion of the city to the use for which it was best suited, having regard to the topography, existing and probable future requirements of each type of land use and the desirable relative positions of the various uses;
- b) preventing the mingling of incompatible uses; and

- c) providing a guide for future growth.

The unamended Official Plan consisted of a basic map with very little supporting text or detailed policy statements. Its general nature necessitated the adoption of several amendments which have policy statements that are more detailed to meet with specific problems such as noxious industries, off-street parking and site plan requirements.

5.3 Functions of City Departments Involved with Industrial Land Planning and Development

Responsibility for industrial planning and development is shared by departments at local and regional levels. The functions of the departments involved with industrial land are summarized below.

- a) Real Estate Department - responsible for the purchasing, selling and leasing of industrial lands and properties for the City of Hamilton.
- b) Department of (Regional) Planning and Development - responsible for the preparation of the Regional Official Plan. Applications for subdivision of land within the City of Hamilton must receive final approval by the Department of Planning and Development to ensure that the plans conform to the Regional Official Plan.
- c) Department of Planning and Development (Local) - The Planning and Development Department for the City of Hamilton is a division of the Regional department and is responsible for the preparation of the Official Plan for the City of Hamilton and the coordination of research and planning for industrial land use in Hamilton.
- d) Business Development Division - responsible for the research and promotion of industrial development and capital investment opportunities within the Hamilton-Wentworth Region.
- e) City Engineering Department - responsible for the design, planning, surveying, tendering and inspection of construction of roads, sidewalks, catch basins and other public works and the coordination of utilities such as hydro, gas, rail and telephone.
- f) Regional Department of Engineering - responsible for the formulation and design of plans for the Regional transportation system and for the construction and operation of facilities for water supply, sewage and waste disposal.

For the development process to be efficient the responsible departments must function in a coordinated and effective manner. Since the responsibilities of the above departments are not limited to industrial land development, their individual priorities may not coincide.

There has been some effort by the Regional Council to coordinate the activities of the Regional departments. A Regional Coordinator was appointed to provide for cooperation and liaison. Through weekly meetings with all department heads the Coordinator ensures that each department operates efficiently and ultimately prevents each department from working at cross purposes.

5.4 Industrial Land Development Process

A landowner who is interested in subdividing his land for industrial development must first prepare and submit a draft plan of subdivision. This proposal is received and circulated by the Planning and Development Committee to the various departments for technical reports and recommendations.

After the City and Regional Councils have affirmed the tentative subdivision plan, the Engineering Department prepares a detailed design for the servicing of the land along with the appropriate cost schedules.

A serviced lot is provided with water, storm and sanitary sewers, gas, hydro, telephone, curbs, gutters and roads. Servicing of a subdivision is the financial responsibility of the developer. Arrangements to pay by installment may be made under a servicing agreement with the City.

A formal subdivision plan incorporating the servicing and engineering details is then submitted for final review and approval. Pursuant to the Official Plan Amendment No. 228 a subdivision plan in an undeveloped area may not be processed until a neighbourhood plan has been established for that area.

After final approval has been given, the necessary zoning changes must be made before the developer can begin subdivision and servicing of individual lots.

City developed subdivisions are usually divided into lots which average 3/4 of an acre in area. This size is versatile and involves less waste since the industrialist can purchase as few or as many lots as required.

5.5 Factors Which Contribute to a Short Supply of Serviced Industrial Land

1. Lack of Trunk Sewers

The present (1976) shortage of serviced industrial land in the City of Hamilton is for the most part, a result of the delays encountered in enacting appropriate zoning in the East Mountain Industrial Park. This is reflected in the fact that 525 acres remain unserviced in the tract of land bounded by Stone Church Road, the C.N.R. line and Albion Road. The land required for the construction of trunk lines in this area is presently held under private ownership. The land situated to the west and east of this block is serviceable although local sewer lines must be extended from the existing trunk facilities.

2. Fragment Land Ownership

Investment in industrial land on a large scale enables the developer to maintain the cost of land at a price attractive to the industrialist while ensuring a proper return on the initial investment. If the expenditures for servicing and purchasing can be spread over many saleable acres then land development becomes a profitable venture. Large acreages of land are difficult to assemble due to the number of individual titles to various parcels of land. This problem exists in most areas, however, in the East Mountain Industrial area the major portion of the land is held privately and may present an impediment to planning for industrial land use.

3. Limited Involvement of Private Developers

Private developers have not participated to a large extent in the development of industrial land in Hamilton. Because of this lack of involvement by the private sector there has been little demand for improvements to the development and servicing process.

4. Industrial Land as a Priority for Planning

An attempt must be made to accommodate those industries displaced by residential zoning to safeguard the economy and employment opportunities characteristic of the areas affected.

5. Regional Issues

The Regional Official Plan will designate the amount and location of future industrial land in a regional perspective. Regional Council will further determine the priorities for Hamilton-Wentworth's one million dollars per annum acquisition policy for industrial parks until 1980. As well the overall transportation and servicing framework is the responsibility of Regional Council and any major developments in these areas will have an immediate impact on the City of Hamilton.

TABLE A-1

COMPARISON OF RESIDENTIAL LABOUR FORCE, BY INDUSTRIAL
DIVISIONS AND SEX, FOR THE CITY OF HAMILTON 1951

<u>Industry</u>	<u>Total</u>	<u>Male (%)</u>	<u>Female (%)</u>	<u>% of Overall Labour Force</u>
All Industries	95,125	72%	28%	
Primary	354	79%	21%	0.4%
Manufacturing	51,385	77%	23%	54.0%
Construction	5,749	97%	3%	6.0%
Transportation, (Storage) Communication, and Utilities	5,750	86%	14%	6.0%
Trade	13,362	66%	34%	14.1%
Finance, Insurance and Real Estate	2,282	58%	42%	2.4%
Community, Business and Personal Service Industries	12,620	42%	48%	13.3%
Public Administration and Defence	2,871	80%	20%	3.0%
Unspecified	752	74%	26%	0.8%

Source: 1951 Census of Canada V.1. 1V

TABLE A-2

COMPARISON OF RESIDENTIAL LABOUR FORCE, BY INDUSTRIAL
DIVISIONS AND SEX, FOR THE CITY OF HAMILTON 1961

<u>Industry</u>	<u>Total</u>	<u>Male (%)</u>	<u>Female (%)</u>	<u>% of Overall Labour Force</u>
All Industries	108,773	70%	30%	
Primary	720	81%	19%	0.7%
Manufacturing	45,372	81%	19%	41.7%
Construction	7,707	96%	4%	7.1%
Transportation, (Storage) Communication, and Utilities	6,678	86%	14%	6.1%
Trade	17,181	62%	38%	15.8%
Finance, Insurance and Real Estate	3,381	51%	49%	3.1%
Community, Business and Personal Service Industries	21,507	38%	62%	19.8%
Public Administration and Defence	4,045	79%	21%	3.7%
Unspecified	2,182	82%	18%	2.0%

Source: 1961 Census of Canada Vol. 3.2-1

TABLE A-3

COMPARISON OF RESIDENTIAL LABOUR FORCE, BY INDUSTRIAL
DIVISIONS AND SEX, FOR THE CITY OF HAMILTON 1971

<u>Industry</u>	<u>Total</u>	<u>Male (%)</u>	<u>Female (%)</u>	<u>% of Overall Labour Force</u>
All Industries	133,860	65%	35%	
Primary	925	60%	40%	0.7%
Manufacturing	48,695	81%	19%	36.4%
Construction	8,365	95%	5%	6.2%
Transportation, (Storage) Communication, and Utilities	6,635	83%	17%	5.0%
Trade	19,060	56%	44%	14.2%
Finance, Insurance and Real Estate	5,060	46%	54%	3.8%
Community, Business and Personal Service Industries	31,965	38%	62%	23.9%
Public Administration and Defence	4,785	72%	28%	3.6%
Unspecified	8,355	55%	45%	6.2%

Source: 1971 Census of Canada Vol. 3.4 Cat. 94-740

TABLE A-4

COMPARISON OF RESIDENTIAL MANUFACTURING LABOUR FORCE,
BY DETAILED INDUSTRIAL DIVISIONS AND SEX, FOR THE CITY
OF HAMILTON 1951

<u>Industry</u>	<u>Total</u>	<u>Male (%)</u>	<u>Female (%)</u>	<u>% of Manufacturing Labour Force</u>
All Manufacturing	51,385	77%	23%	
Food and Beverages	2,577	67%	33%	5.0%
Tobacco Products	400	41%	59%	0.8%
Rubber and Plastics	1,234	86%	14%	2.4%
Leather Products	198	78%	22%	0.4%
Textiles (excl.clothing)	2,691	47%	53%	5.2%
Clothing (incl.knitting)	3,610	34%	66%	7.0%
Wood Products	459	90%	10%	0.9%
Furniture and Fixtures	NA	NA	NA	-
Paper Products	1,237	64%	36%	2.4%
Printing and Publishing	1,125	80%	20%	2.2%
Iron and Steel	21,178	90%	10%	41.2%
Primary Metal	NA	NA	NA	-
Metal Fabricating	NA	NA	NA	-
Machinery	NA	NA	NA	-
Non-ferrous Metal	990	76%	24%	1.9%
Transportation Egmnt	3,296	95%	5%	6.4%
Electrical Products	8,200	71%	29%	16.0%
Non-metallic Mineral	1,957	83%	17%	3.8%
Petroleum Products	259	97%	3%	0.5%
Chemical Products	1,227	83%	17%	2.4%
Miscellaneous	747	66%	34%	1.5%

Source: 1951 Census of Canada Vol. IV

TABLE A-5

COMPARISON OF RESIDENTIAL MANUFACTURING LABOUR FORCE,
BY DETAILED INDUSTRIAL DIVISIONS AND SEX, FOR THE CITY

<u>Industry</u>	<u>Total</u>	<u>OF HAMILTON</u>		<u>1961</u>
		<u>Male (%)</u>	<u>Female (%)</u>	<u>% of Manufacturing Labour For</u>
All Manufacturing	45,372	81%	19%	
Food and Beverages	4,102	67%	33%	9.0%
Tobacco Products	433	40%	60%	1.0%
Rubber and Plastics	1,184	83%	17%	2.6%
Leather Products	327	37%	63%	0.7%
Textiles (excl.clothing)	1,523	48%	52%	3.4%
Clothing (incl.knitting)	1,183	38%	62%	2.6%
Wood Products	294	89%	11%	0.6%
Furniture and Fixtures	239	88%	12%	0.5%
Paper Products	1,215	73%	27%	2.7%
Printing and Publishing	1,413	76%	24%	3.1%
Iron and Steel	NA	NA	NA	-
Primary Metal	12,824	94%	6%	28.3%
Metal Fabricating	5,017	87%	13%	11.1%
Machinery	3,807	90%	10%	8.4%
Non-ferrous Metal	NA	NA	NA	-
Transportation Egmnt	2,052	93%	7%	4.5%
Electrical Products	4,969	75%	25%	11.0%
Non-metallic Mineral	2,255	76%	24%	5.0%
Petroleum Products	103	86%	14%	0.2%
Chemical Products	1,383	78%	22%	3.0%
Miscellaneous	1,049	66%	34%	2.3%

Source: 1961 Census of Canada Vol. 3.2-1

TABLE A-6

COMPARISON OF RESIDENTIAL MANUFACTURING LABOUR FORCE,
BY DETAILED INDUSTRIAL DIVISIONS AND SEX, FOR THE CITY
OF HAMILTON 1971

<u>Industry</u>	<u>Total</u>	<u>Male (%)</u>	<u>Female (%)</u>	<u>% of Manufacturing Labour Force</u>
All Manufacturing	48,695	81%	19%	
Food and Beverages	3,795	59%	41%	7.8%
Tobacco Products	50	70%	30%	0.1%
Rubber and Plastics	1,400	85%	15%	2.9%
Leather Products	460	25%	75%	0.9%
Textiles (excl.clothing)	1,725	36%	64%	3.5%
Clothing (incl.knitting)	1,405	22%	78%	2.9%
Wood Products	185	89%	11%	0.4%
Furniture and Fixtures	245	86%	14%	0.5%
Paper Products	1,160	68%	32%	2.4%
Printing and Publishing	1,290	72%	28%	2.6%
Iron and Steel	NA	NA	NA	-
Primary Metal	18,030	95%	5%	37.0%
Metal Fabricating	4,605	87%	13%	9.5%
Machinery	3,030	87%	13%	6.2%
Non-ferrous Metal	NA	NA	NA	-
Transportation Egmnt	2,455	95%	5%	5.0%
Electrical Products	4,440	76%	24%	9.1%
Non-metallic Mineral	1,995	77%	23%	4.1%
Petroleum Products	145	83%	17%	0.3%
Chemical Products	1,510	81%	19%	3.1%
Miscellaneous	770	68%	32%	1.7%

Source: 1971 Census of Canada Vol. 3.4 Cat. 94-740

TABLE A-7
By Place of Work
COMPARISON OF MANUFACTURING LABOUR FORCE, BY DETAILED
INDUSTRIAL DIVISIONS AND SEX, FOR THE CITY OF HAMILTON
1971

<u>Industry</u>	<u>Total</u>	<u>Male (%)</u>	<u>Female (%)</u>	<u>% of Manufacturing Labour For</u>
All Manufacturing	58,925	49,450 (84)	9,475 (16)	
Food and Beverages	3,480	2,150 (62)	1,330 (38)	5.9
Tobacco Products	20	20 (100)	0 (0)	0.0
Rubber and Plastics	1,910	1,655 (87)	255 (13)	3.2
Leather Products	410	110 (27)	300 (73)	0.7
Textiles (excl.clothing)	1,960	820 (42)	1,140 (58)	3.3
Clothing (incl.knitting)	1,450	360 (25)	1,090 (75)	2.5
Wood Products	125	105 (84)	20 (16)	0.2
Furniture and Fixtures	155	130 (84)	25 (16)	0.3
Paper Products	1,275	900 (71)	375 (29)	2.2
Printing and Publishing	1,655	1,260 (76)	395 (24)	2.8
Iron and Steel	na	na	na	na
Primary Metal	24,510	23,290 (95)	1,220 (5)	41.6
Metal Fabricating	5,270	4,660 (88)	610 (12)	8.9
Machinery	4,050	3,620 (89)	425 (11)	6.9
Non-ferrous Metal	na	na	na	na
Transportation Egmnt	1,770	1,680 (95)	90 (5)	3.0
Electrical Products	5,675	4,515 (80)	1,160 (20)	9.6
Non-metallic Mineral	2,245	1,775 (79)	470 (21)	3.8
Petroleum Products	180	150 (83)	30 (17)	0.3
Chemical Products	2,005	1,695 (85)	310 (15)	3.4
Miscellaneous	790	565 (72)	225 (28)	1.4

Source: 1971 Census of Canada Vol. 3.4 Cat. 94-744

TABLE A-8

COMPARISON OF LABOUR FORCE, BY INDUSTRIAL DIVISIONS,
For ONTARIO 1951, 1961 and 1971.

Industry	Percentage of Overall Labour Force			Change in Percentage of Overall Labour Force		
	<u>1951</u>	<u>1961</u>	<u>1971</u>	<u>51-61</u>	<u>61-71</u>	<u>51-71</u>
All Industries						
Primary	13.7	9.7	5.4	-4%	-4.3	-8.3
Manufacturing	32.6	26.9	24.4	-5.7%	-2.5	-8.2
Construction	6.8	6.4	6.1	-0.4%	-0.3	-0.7
Transportation (Storage) Communication, and utilities	8.4	8.2	6.6	-0.2%	-1.6	-1.8
Trade	14.2	15.5	14.8	+1.3	-0.7	+0.6
Finance, Insurance and Real Estate	3.3	4.1	4.6	+0.8	+0.5	+1.3
Community, Business and Personal Service Industries	13.9	19.5	23.5	+5.6	+4.0	+9.6
Public Administration and Defence	6.2	7.6	7.4	+1.4	-0.2	+1.2
Unspecified	0.9%	2.1	7.2			

Sources: 1951 Census of Canada Vol. 1V

1961 Census of Canada Vol. 3.2-1

1971 Census of Canada Vol. 3.4 Cat. 94-740

TABLE A-9

COMPARISON OF LABOUR FORCE, BY INDUSTRIAL DIVISIONS,
For CANADA 1951, 1961 and 1971.

<u>Industry</u>	Percentage of Overall Labour Force			Change in Percentage of Overall Labour Force		
	<u>1951</u>	<u>1961</u>	<u>1971</u>	<u>51-61</u>	<u>61-71</u>	<u>51-71</u>
All Industries						
Primary	21.0	14.0	8.4	-7.0%	-5.6%	-12.6%
Manufacturing	25.7	21.7	19.8	-4.0%	-1.9%	-4.9%
Construction	6.6	6.7	6.2	+0.1%	-0.5%	-0.4%
Transportation (Storage) Communication, and utilities	8.8	9.3	7.8	+0.5%	-1.5%	-1.0%
Trade	13.5	15.3	14.7	+1.8%	-0.6%	+1.2%
Finance, Insurance and Real Estate	2.7	3.5	4.2	+0.8%	+0.7%	+1.5%
Community, Business and Personal Service Industries	14.6	19.5	23.7	+4.9%	+4.2%	+9.1%
Public Administration and Defence	5.8	7.5	7.4	1.7%	-0.1%	+1.6%
Unspecified	1.3	2.5	7.8			

Sources: 1951 Census of Canada Vol. 1V

1961 Census of Canada Vol. 3.2-1

1971 Census of Canada Vol. 3.4 Cat. 94-740

HAMILTON HARBOUR

APPENDIX 1

LEGEND

- LANDS REZONED FROM INDUSTRIAL
TO RESIDENTIAL AND OTHER USES
IN ACCORDANCE WITH THE
NEIGHBOURHOOD PLANNING PROGRAM

APRIL 1976

THE CITY OF HAMILTON

PREPARED BY
THE REGIONAL MUNICIPALITY OF HAMILTON-WENTWORTH
PLANNING AND DEVELOPMENT DEPARTMENT

SCALE 1:5000

REVISION: MARCH, 1976



APPENDIX 2

LEGEND

- NONCONFORMING INDUSTRIAL LAND
USE - REZONINGS* 1971 - APRIL 1976
- * NON-CONFORMING INDUSTRIAL LAND USES ARE THOSE WHICH
ARE DESIGNATED OTHER THAN INDUSTRIAL IN THE CITY'S
OFFICIAL PLAN. IN MOST CASES THEY ARE INCLUDED UNDER
A MODIFIED ZONING WHICH ALTHOUGH LIMITING THE NUMBER
OF PERMITTED USES, DOES ALLOW FOR EXISTING USE.

THE CITY OF HAMILTON

PREPARED BY
THE REGIONAL MUNICIPALITY OF HAMILTON-WENTWORTH
PLANNING AND DEVELOPMENT DEPARTMENT

SCALE 1"=100'

REVISED MARCH, 1975

